



# **BN361**

# **Benefit Enrollment and Maintenance**

**Instructor Led Training**



# Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

The following HCM training materials are located on the Cardinal website ([www.cardinalproject.virginia.gov](http://www.cardinalproject.virginia.gov)) under Training:

- Job Aids on topics across all functional areas
- Functional process and instructional videos

The Cardinal HCM Reports Catalog is located on the Cardinal website under Resources.

This course and all other Cardinal HCM training courses are available on the Cardinal Training Management System.

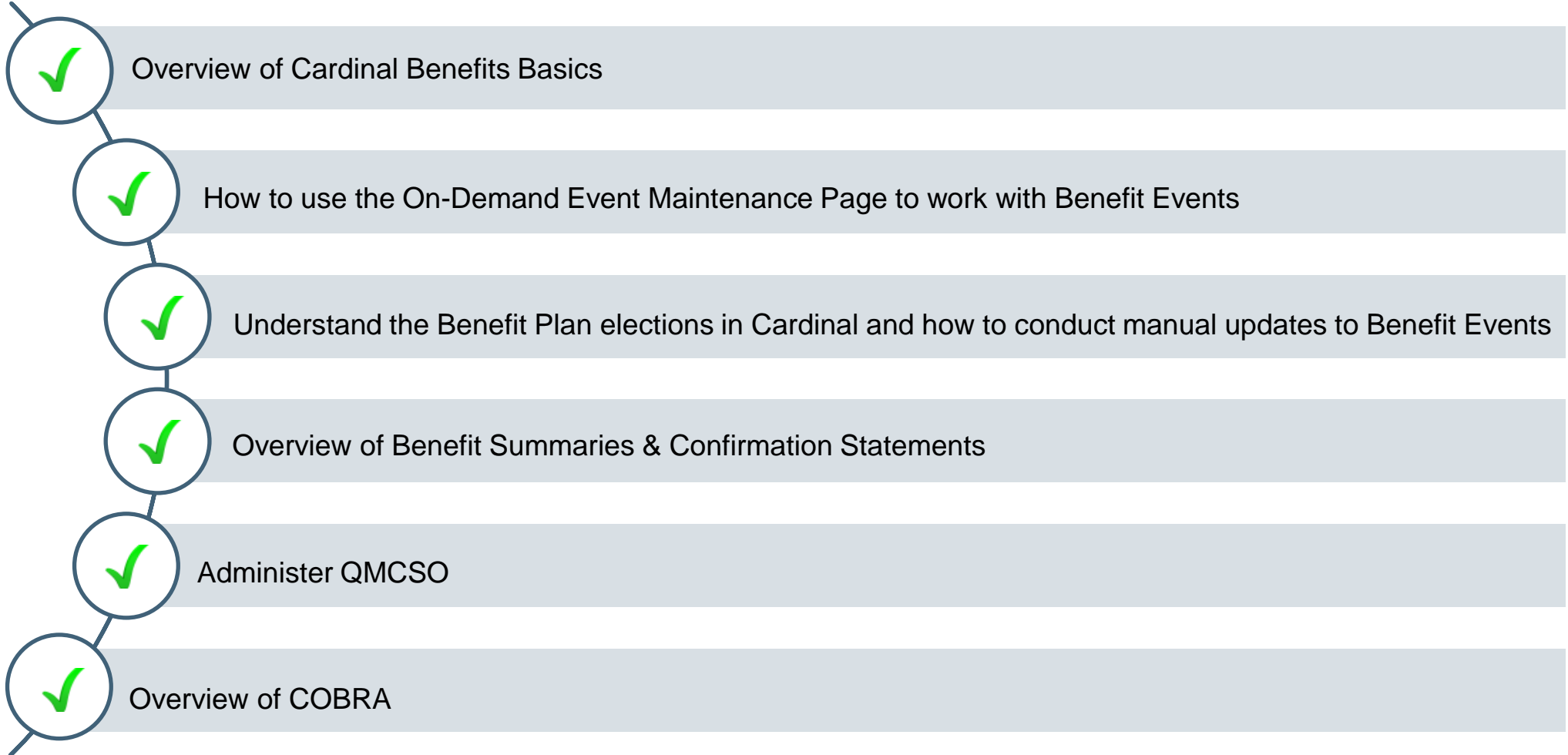
The system screenshots included in the Cardinal HCM training courses show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

- For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



# Course Objectives

After completing this course, you will be able to:





## Course Objectives (continued)



Track and Manage Benefits Reconciliations



Administer ACA Reporting



# Agenda

1

Cardinal Benefit Basics

2

On-Demand Event Maintenance Page

3

Benefit Plan Elections

4

Benefit Summaries & Confirmation Statements

5

QMCSO Administration

6

Overview of COBRA



# Agenda

7

Benefits Reconciliation

8

ACA Administration



# Lesson

1

## Cardinal Benefit Basics

This lesson covers the following topics:

- Cardinal Integration Overview
- Benefits Administration Overview
- Benefit Administration Reports Overview

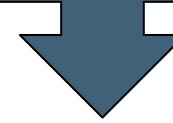


# Cardinal HCM Responsibilities and Relationships

In Cardinal HCM, HR Administrators, BN Administrators, TL Administrators, Payroll Administrators and State Payroll Operations (SPO) work together so that all employees are paid on time and accurately.

## State Payroll Operations (SPO)

- Defines Operations Calendar
- Runs Payroll Processes
- Runs Year End Processes



Accurate  
Paycheck

### Human Resources (HR)

- Position
- Person
- Job

### Benefits (BN)

- Medical
- FSA
- Retirement
- TPA (TIAA, FBMC, ICMA-RC)

### Time & Attendance (TA)

- Time
- Absences
- Approval

### Payroll (PY)

- Earnings
- Deductions
- Taxes
- Review Paychecks





# Benefits Administration Overview

The **Benefits Administration** functional area includes all processes and sub-processes required for maintaining benefits for the organization's employees and their dependents.

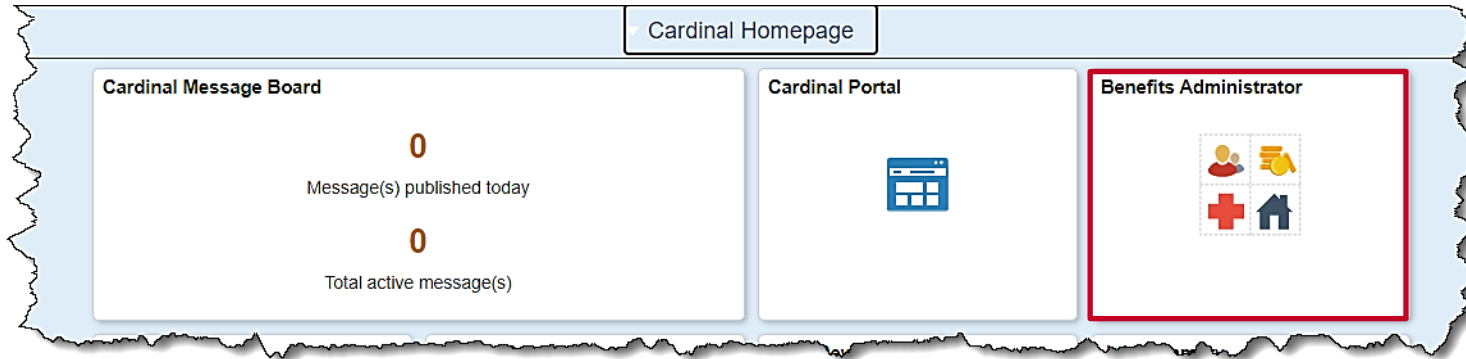
The Benefits Administration processes and sub-processes are:

- **Administer Event Maintenance**
  - Maintain Enrollments:
    - System Generated Benefit Events
    - Forms Life Events
    - Qualified Medical Court Support Orders (QMCSO)
    - Retirement
    - Deferred Compensation
    - Annuity
- **Administer Open Enrollment**
- **Administer COBRA**
- **Benefits Reconciliation**
  - Health Reconciliation
  - VRS Billing Reconciliation
- **ACA Reporting**



# Benefit Administrator Tile

Use the **Benefits Administrator** tile to manage an employee's benefits enrollment(s):



The screenshot shows the "Benefits Administrator" interface. The top header is dark blue with the title "Benefits Administrator" and icons for home, menu, and search. Below the header is a sidebar with a list of options: "Employee/Dependent Information", "Update Dependent/Beneficiary" (highlighted in green), "Maintain Certifications", "Enroll in Benefits", "Review Employee Benefits", and "Benefits Management". The main content area is titled "Update Dependent/Beneficiary" and contains a search form. The form has a green button labeled "Find an Existing Value" and a section titled "Search Criteria" with three rows of input fields: "Empl ID" (beginning with), "Name" (beginning with), and "Last Name" (beginning with). Each row has a dropdown menu and a text input field.



# Maintain Certifications

**Navigation:** Benefits Administrator Tile > Employee/Dependent Information > Maintain Certifications

BAs continue to maintain certifications for disabled dependents, which are still re-certified every 2 years.

The screenshot shows the 'Maintain Certifications' interface. On the left is a sidebar with the following menu items: 'Employee/Dependent Information' (selected), 'Update Dependent/Beneficiary', 'Update ABBRs', 'Maintain Certifications' (highlighted in green), 'Enroll in Benefits', 'Review Employee Benefits', 'Benefits Management', and 'Benefits Configuration'. The main content area is titled 'Maintain Certifications' and displays the following fields and controls:

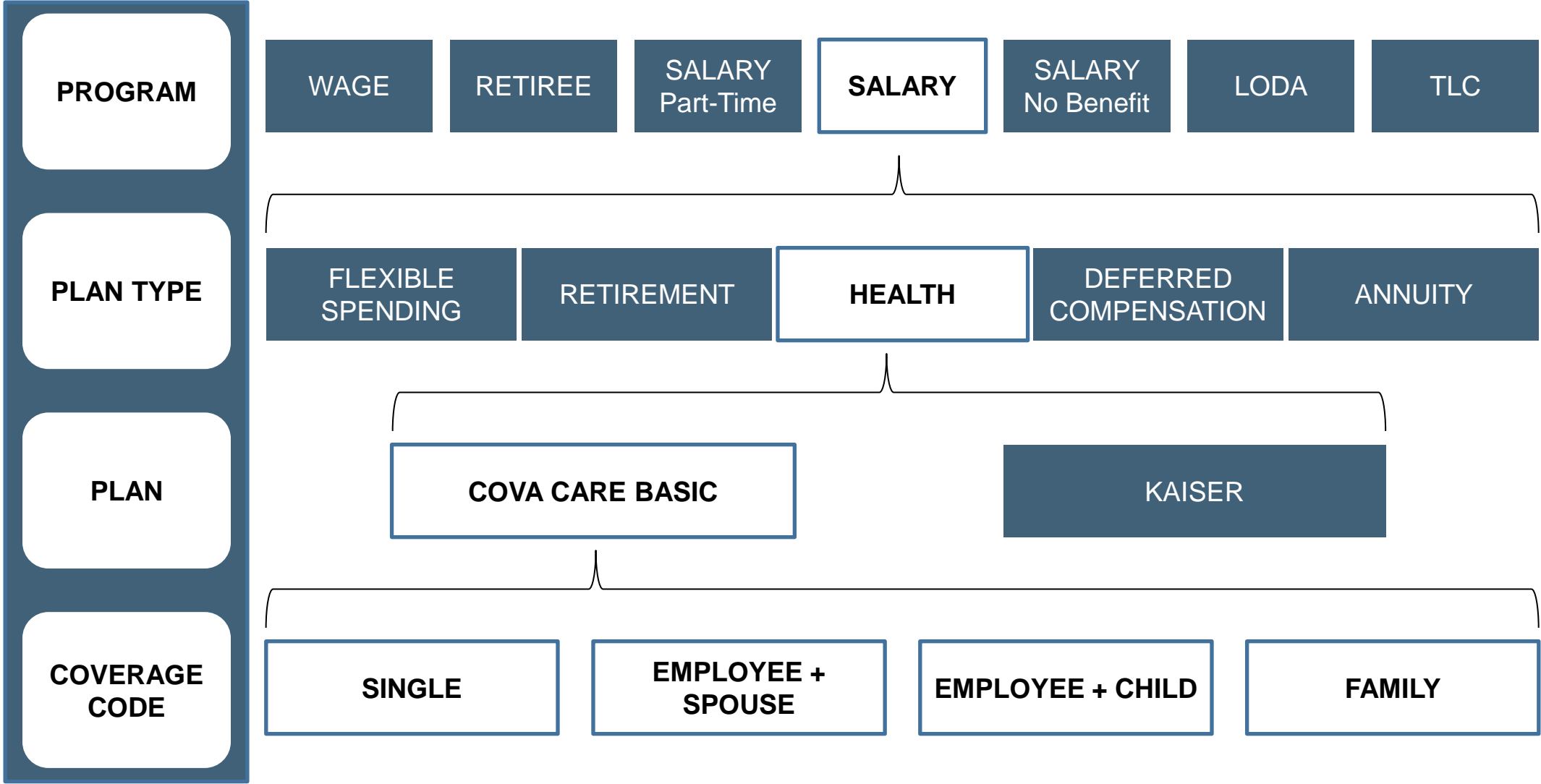
- Employee ID: [Redacted]
- Benefit Record Number: 0
- Certificates** section with a search bar and pagination (1 of 1, View All).
- \*Certificate ID: Text input with 'DISABILITY' and a search icon.
- \*Plan Type: Dropdown menu with 'Medical' selected.
- \*Effective Date: Date picker with '12/03/2020' selected.
- Value: Text input with '0'.
- Disability Certification EE/DP: Text input with a '+' and '-' button.
- Benefit Program: Text input.
- \*Status: Dropdown menu with 'Active' selected.
- Expiration Date: Date picker with '12/03/2022' selected.
- Certificate Maximum Value: 1.
- Dependent/Beneficiary ID: Section header with a dropdown menu showing a redacted ID.

At the bottom are several buttons: 'Save' (green), 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

**Note:** The **Maintain Certifications** option under **Employee/Dependent Information** is used to track disabled dependents.



# Benefit Program Overview



**Note:** For further information and a complete list of benefits plans, refer to the Job Aid titled **BN361 Quick Reference Guide**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.



# Benefit Events Overview

Benefit Events evaluate or reevaluate an employee's benefit eligibility and provide the employee with the opportunity to update their enrollment, if appropriate. All benefit enrollments or changes are made through a Benefit Event.

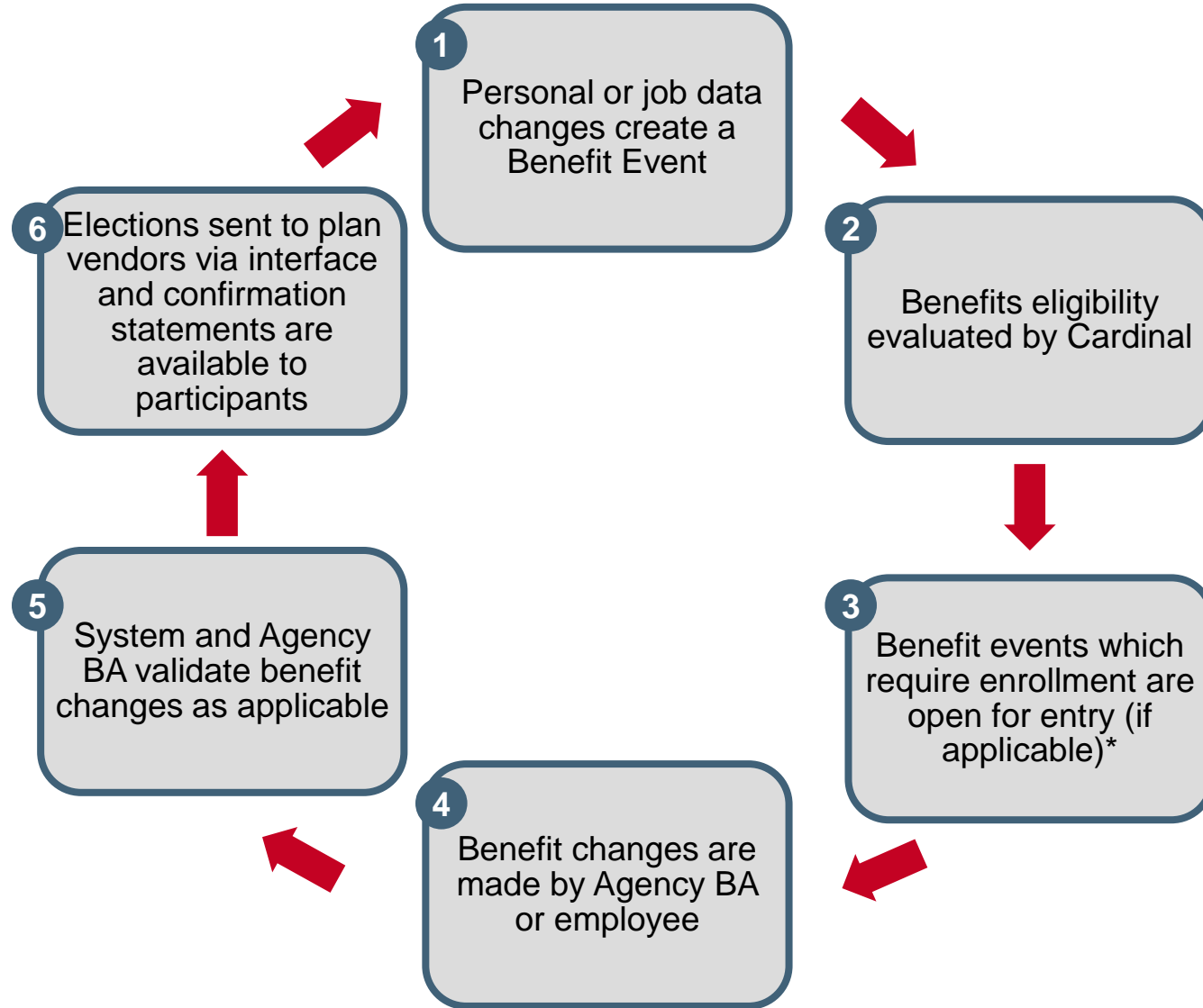
- **Benefit events are:**
  - Triggered by entry of qualifying personal and/or job data changes by HR Administrator
  - Entered manually by Agency Benefits Administrator (BA) triggered from employee-submitted form
  - Generated automatically via qualifying Employee Self-Service (ESS) entry by employee
- **Life Events:**
  - Initiated by changes through ESS for birth, adoption, marriage, and divorce Life Events
  - Agency BA reviews documentation and reverses enrollment if event not supported
  - Initiated by Agency BA after employee requests changes and provides documentation
- **Examples of Benefit Events include:**
  - Hire Event
  - Qualifying Life Event (e.g., Birth Event, Adoption Event, Marriage Event, Divorce Event)
  - Leave of Absence (LOA) Event

**Only one benefit event can be open at any time.** It is extremely important that open events are monitored and processed as soon as possible.

**Note:** For further information on Benefit Events and the Benefit Enrollment process, refer to the Job Aid titled **BN361 Enrollment Steps for an Employee**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.



# Lifecycle of an Event

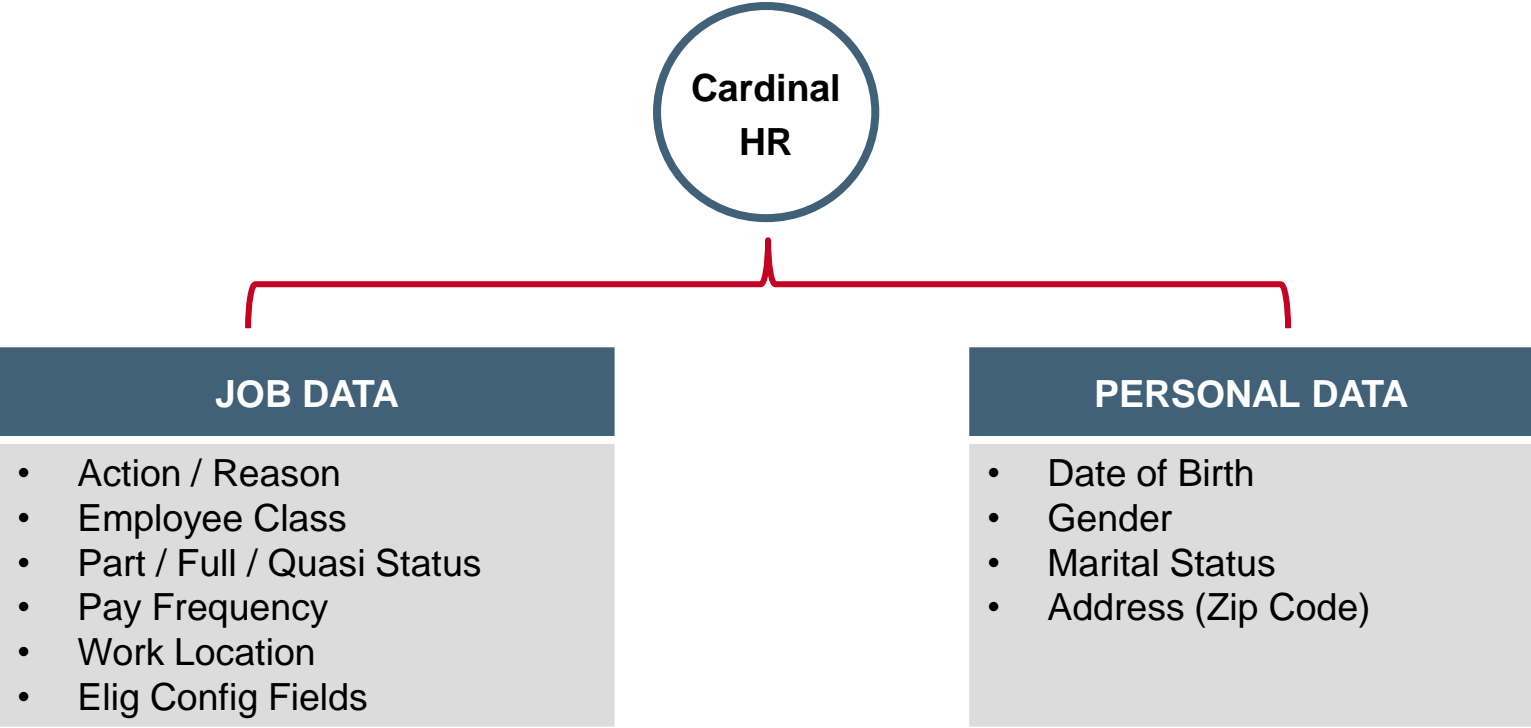


\*Most job changes invoke a Benefit Event to be evaluated by Benefit Administration, but many are immediately closed because no benefits eligibility change exists (e.g., supervisor change)



# Benefits Eligibility

Cardinal HR maintains effective-dated enrollment history for each applicable employee. Cardinal Benefits Administrator evaluates when changes occur to employee personal or job data. Changes that could potentially impact benefits include the following:



**Note:** Agencies must maintain a minimum amount of position and job data for HR Level 3 employees in Cardinal to process benefit enrollments. For further information on Eligibility Configuration Fields, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal Website in **Job Aids** under **Training**.



# Benefits Basic Concepts

## Benefit Enrollment Date:

The Benefits functional area contains multiple fields related to effective dating. The following table displays the key date-related fields used in processing:

| Benefit Enrollment Field | Definition  |
|--------------------------|---|
| DEDUCTION BEGIN DATE     | The date the deduction begins for the employee.   |
| COVERAGE BEGIN DATE      | The date the coverage starts.   |
| ELECTION DATE            | The date the employee elects their benefits. This is typically the date the coverage changes are entered into the system. |

## Benefit Enrollment Date Example:

- An employee got married on 1/15
- The employee elected to add their spouse as a dependent on 1/17
- The employee's spouse's coverage begins on the first day of the month following marriage (2/1)
- **DEDUCTION BEGIN DATE = 2/1**
- **COVERAGE BEGIN DATE = 2/1**
- **ELECTION DATE = 1/17**





# Benefits Basic Concepts (continued)

Retroactive coverage can be identified by examining the benefit enrollment fields.

## **Retroactive Coverage Example:**

- An employee retires on 1/24.
- The employee's current plan provides coverage through the end of January.
- Virginia Retirement System (VRS) hires the retired employee into the VRS Retiree Business Unit (VRSRT), effective the first day of the following month (2/1).
- The retired employee or Agency BA enters their benefit elections into Cardinal on 2/15.
- Coverage retroactively begins on 2/1.

**DEDUCTION BEGIN DATE = 2/1**

**COVERAGE BEGIN DATE = 2/1**

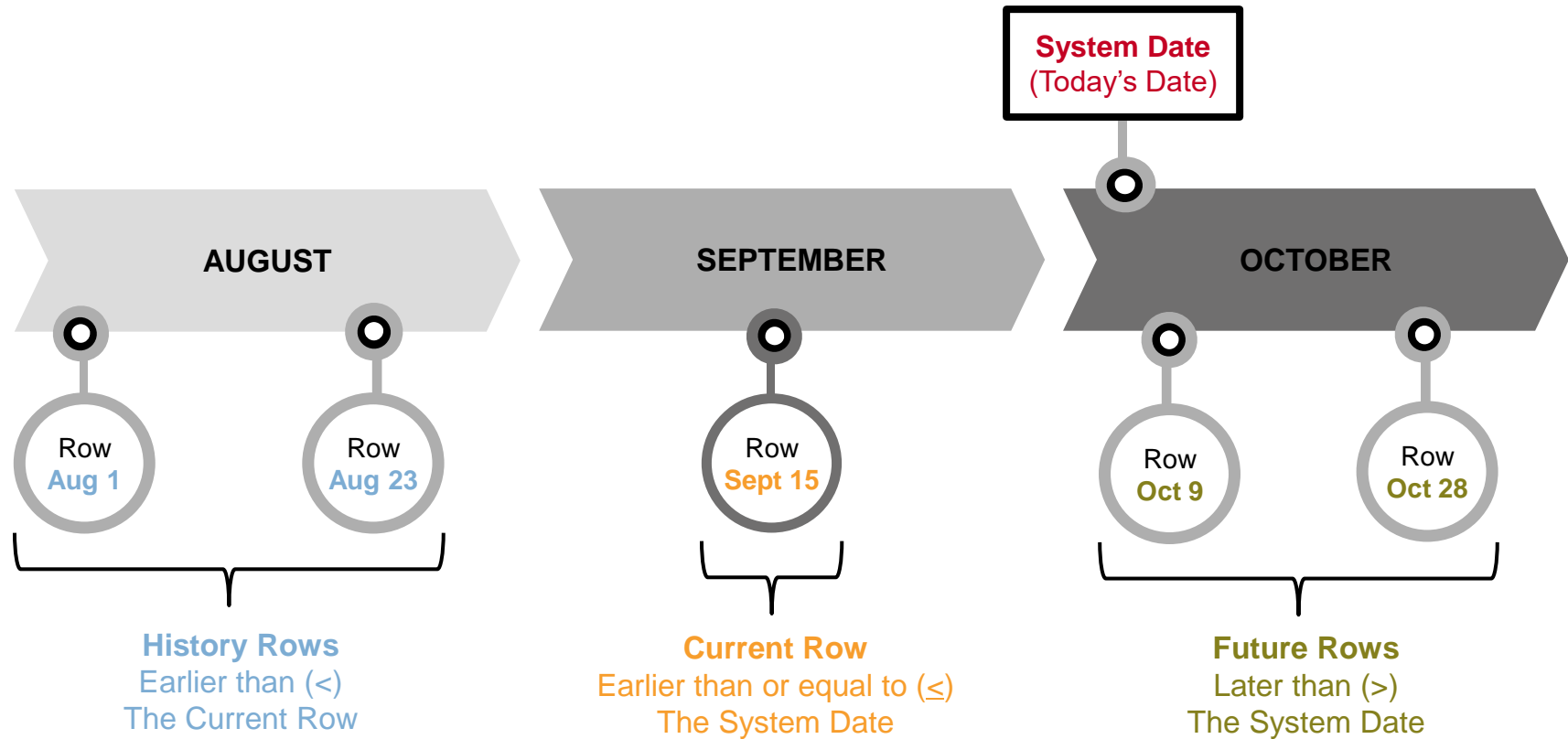
**ELECTION DATE = 2/15**

**Note:** For further information on effective dating, refer to the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.



# Effective Dating

The following diagram defines current, history, and future effective dates:



[illegible]18



# Agency BA Reports/Query Inventory

| Work Unit     | Work Unit Title               | Report Description   | Report/Query |
|---------------|-------------------------------|--|--------------|
| <b>RBN301</b> | Dependent Approval Report     | Lists employees and associated dependents approaching an age-related milestone that requires health care enrollment changes to remain compliant with policy. Report also identifies outstanding approvals for new dependents and disabled dependents that may need to be re-certified as disabled. | Report       |
| <b>RBN168</b> | COBRA Event Summary Report    | Provides data about COBRA beneficiaries at the Event Level. The report will list all employees to whom a COBRA event has occurred. The qualified status will indicate to the user whether the event is Qualified (QL), Not Qualified (NQ), Not qualified/duplicate (ND) or QE (Qualify Error).     | Report       |
| <b>RBN009</b> | Defaulted OE Elections Report | Used by agency Benefits Administrators providing a list of employees whose health benefit plan will be defaulted to a new plan because an old plan is no longer offered if no action is taken.   | Report       |
| <b>RBN148</b> | ICMA Upload Error Report      | Lists employees on the monthly ICMA-RC Upload file whose deferred compensation changes were not loaded to Cardinal. Report includes the applicable error/warning message and enrollment information necessary to allow manual entry into Cardinal.   | Report       |
| <b>RBN041</b> | Invalid Benefit Elections     | Shows invalid benefit elections, which includes errors, such as coverage over the maximum or under the minimum, invalid choices, failure to meet eligibility requirements, etc.  | Report       |

**Notes:** For a full list of Benefit Reports and Queries refer to the **Cardinal HCM Reports Catalog** which is located on the Cardinal website under Resources.



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. From the information below fill in the correct date for the employee's benefit enrollment field:
  - An employee got married on **5/05**
  - The employee enrolled their spouse in health care through Cardinal Self -Service on **5/20**

**Coverage Effective Date = \_\_\_\_\_**



# Lesson Summary

1

## Cardinal Benefit Basics

In this lesson, you learned

- An overview of the Cardinal Integration process
- An overview of Benefits Administration



# Lesson

2

## On-Demand Event Maintenance Page

This lesson covers the following topics:

- Overview and Walkthrough of the On-Demand Event Maintenance Page:
  - Creating an Event
  - Adding a Manual Event
  - Reviewing an Event
  - Approving a Dependent
  - Reopening an Event
  - Enrolling in Benefits
  - Finalizing an Event



# On-Demand Event Maintenance Page

The **On-Demand Event Maintenance** page allows the BA to perform maintenance to currently open and closed Benefits Events.

**Navigation:** Benefit Administration > Benefits Management > On-Demand Event Maintenance > Empl ID Search

Workforce Administrator

Benefits Administrator

New Window | Help | Personalize Page

Employee/Dependent Information

Enroll in Benefits

Review Employee Benefits

Benefits Management

Online Confirmation Statements

FMLA

Review BAS Activity

On-Demand Event Maintenance

Review Processing Messages

Update Event Status

Benefits Configuration

On-Demand Event Maintenance

Person ID Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 3 Show Activities Action

Event ID 0 Event Date Status Class Event Status Update

Prepare Options

Enrollment Statement

Run Date Frequency Deduction Frequency Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Previous in List Next in List Notify





# On-Demand Event Maintenance Page Overview

The following chart provides a description of the button on the **On-Demand Event Maintenance** page:

| Button                           | Description  |
|----------------------------------|--|
| <b>Schedule/Prepare Activity</b> | Initiates the automated programming process that schedules and prepares pending activity   |
| <b>Show Activities</b>           | Displays pending activity to be processed  |
| <b>Event Status Update</b>       | Allows the BA to revert an event to a previous status for reprocessing purposes  |
| <b>Election Entry</b>            | Opens the <b>Ben Admin Election</b> pages, where benefit elections are entered   |
| <b>Validate/Finalize</b>         | Executes the programming process to validate elections, close the event, and update the Base Benefits Tables   |
| <b>Finalize/Apply Defaults</b>   | Force-finalizes a participant's elections and enrolls the participant in default elections, even if the current elections are in error; (Subsequent selection forces the event to close and update Base Benefits)  |
| <b>Reprocess</b>                 | Reprocesses existing events to update employee's records if automatic events or manual events were retroactively added, reprocesses to correct enrollment errors after an event is finalized, or re-opens an event to make additional elections on behalf of an employee |



**DEMO**



# Process Considerations

PeopleSoft Benefits Administration processes all participant Events by using the appropriate Event rule and Event Classification established for each covered Plan Type to evaluate the Event's effect on an employee's benefits eligibility. Each participant Event goes through four steps:

- 1) Assign Benefit Program
- 2) Prepare Options
- 3) Enter Elections
- 4) Finalize Enrollments

BAs are occasionally required to reprocess an Event to recognize eligibility or enrollment changes. Benefits Administration statuses and their interactions are described below:

- **Event Status**
  - Indicates the status of the event (e.g., Opened, Closed, Voided)
- **Process Indicator**
  - Specifies the current Event stage
- **Event Process Status**
  - Indicates if a step has been completed and displays any processing errors for each completed step



# Event Statuses

An Event typically has 3 statuses: Open, Close, or Void. Events must have an Event Status of "Open" to be processed or reprocessed:

| Event Status | Description   |
|--------------|---|
| Open (O)     | Cardinal will process on the next run of the Benefits Administration process. Only one event per Employee ID and Benefit Record Number combination can be opened at one time. The Event Status can be updated to Close automatically by Cardinal or manually on the <b>Event Status Update</b> page.      |
| Close (C)    | Not currently processed by the system. Closed events can be updated to Open, either automatically by Cardinal or manually on the <b>Event Status Update</b> page.   |
| Void (V)     | Has been backed out of the system and all related eligibility processing has been reversed. Use the <b>Controls</b> page or <b>Event Status Update</b> page to change the Event Status to Void. Events with an Event Status of Void can be updated to Open or Close through the Event reprocessing steps. |



# Process Indicator

The Process Indicator tells Cardinal how far back to open the event. Below are the descriptions for each Process Indicator:

| Symbol | Name                   | Description  |
|--------|------------------------|--|
| A      | Assign Benefit Program | Cardinal is attempting to reprocess the participant to a “Prepared” status.  |
| E      | Elect Options          | Cardinal is revalidating elections for the event and resetting the final process to a “Finalized – Enrolled” status.               |
| N      | Normal Processing      | Cardinal is following standard processing procedures.  |
| P      | Prepare Options        | Cardinal is re-evaluating the participant’s option eligibility and attempting to reprocess the participant to a “Prepared” status. |
| R      | Re-Enter               | Cardinal reopens the data entry page to enable election changes, resulting in a “Re-Enter” or “Elections Entered” status.          |
| V      | Void                   | Cardinal is voiding an event. When you void an event, it stays in the status that it was in when it was voided.                    |



# Process Status

The Event Process Status indicates if a step has been completed and displays any processing errors for each completed step:

| Process Status              | Reason  |
|-----------------------------|---|
| <b>Assign None (AN)</b>     | Benefits Administration was unable to assign a benefit program. This could be a result of the Benefit Flag set to a terminated Employee Record.   |
| <b>Assign Error (AE)</b>    | Benefits Administration was unable to assign Benefit Program due to missing or incorrect information.   |
| <b>Assigned (AS)</b>        | Benefits Administration assigned a Benefit Program because a prior event is Open. It is possible the Open Event is appearing on the MSC Event Evaluation report.  |
| <b>Prepare Error (PE)</b>   | Error in preparation of options. The system has encountered an error. This could be a result of a missing ICI ABBR or a missing payroll calendar.   |
| <b>Prepared (PR)</b>        | Cardinal calculated eligible options, credits, rates, and proof requirements for the employee associated with the event, and current elections have been identified for proof, eligibility level, and default processing.       |
| <b>Notified (NT)</b>        | The employee accessed the Self-Service event but has not submitted elections.   |
| <b>Elections Error (EE)</b> | Cardinal encountered an error while attempting to process the employee's elections. This could be a result of the dependent effective dates, a mismatch between coverage code and listed dependents, or a missing pay calendar. |



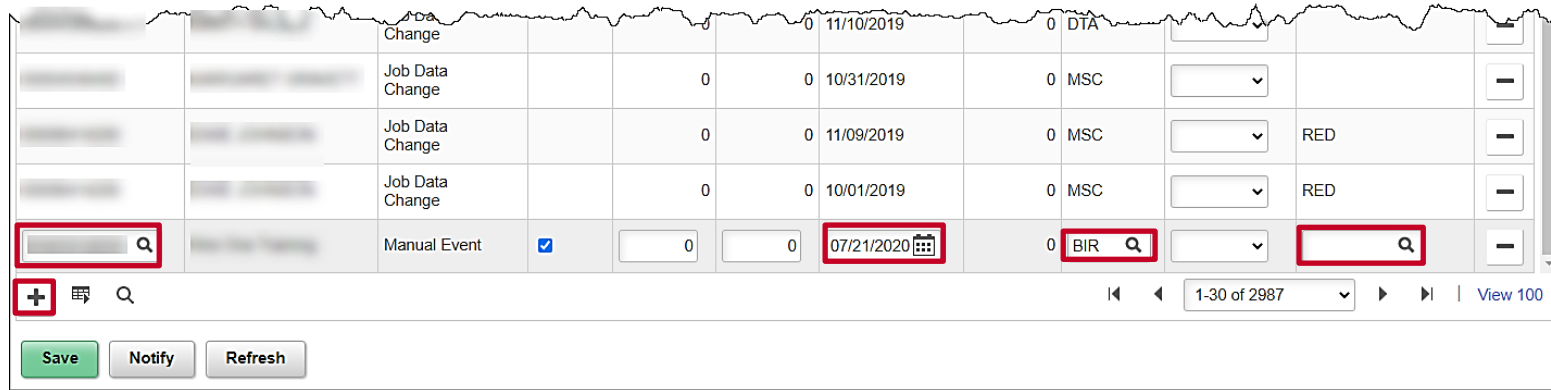
## Process Status (continued)

| Process Status                           | Reason  |
|--|---|
| <b>Re-Enter (RE)</b>                     | BA reopened event   |
| <b>Elections Entered (ET)</b>            | BA (or the employee through ESS) entered new elections, which are ready for validation through the Benefits Administration Process.   |
| <b>Finalized – Benefit Pgm None (FA)</b> | Employee event has no program assignment or current elections. This could be a result of the Benefit Flag set to a terminated Empl Rcd. It could also be the result of an address change when employee is not active. |
| <b>Finalized – Prepare None (FP)</b>     | Benefit Administration is acknowledging that the employee's eligibility has not changed.  |
| <b>Finalized – Enrolled (FE)</b>         | Benefits Administration processing is complete for the employee event. All elections have been validated and loaded.  |

# Creating a Manual Event Benefit Event

Benefit Events are created in the **Review BAS Activity** page and maintained in the **On-Demand Event Maintenance** page

Navigation: Benefits Administrator Tile > Benefits Management > Review BAS Activity

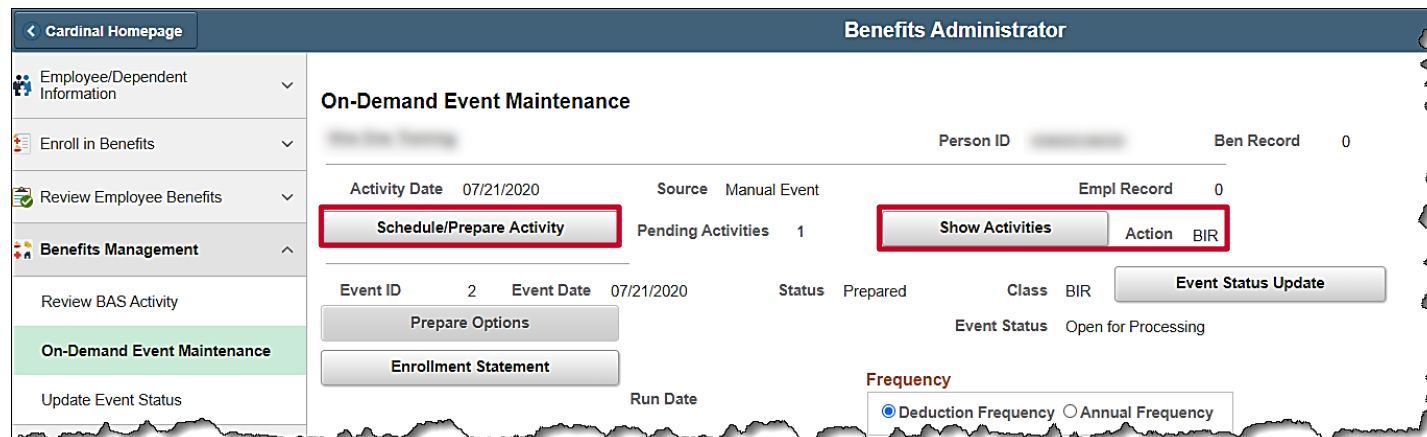


|  |  |                 |                                     |   |   |            |   |     |  |     |  |
|--|--|-----------------|-------------------------------------|---|---|------------|---|-----|--|-----|--|
|  |  | Change          |                                     |   | 0 | 11/10/2019 | 0 | DTA |  |     |  |
|  |  | Job Data Change |                                     | 0 | 0 | 10/31/2019 | 0 | MSC |  |     |  |
|  |  | Job Data Change |                                     | 0 | 0 | 11/09/2019 | 0 | MSC |  | RED |  |
|  |  | Job Data Change |                                     | 0 | 0 | 10/01/2019 | 0 | MSC |  | RED |  |
|  |  | Manual Event    | <input checked="" type="checkbox"/> | 0 | 0 | 07/21/2020 | 0 | BIR |  |     |  |

+ [icon] [icon] 1-30 of 2987 | View 100

Save Notify Refresh

Navigation: Benefits Administrator Tile > Benefits Management > On-Demand Event Maintenance > Empl ID Search



< Cardinal Homepage Benefits Administrator

On-Demand Event Maintenance

Person ID [redacted] Ben Record 0

Activity Date 07/21/2020 Source Manual Event Empl Record 0

**Schedule/Prepare Activity** Pending Activities 1 **Show Activities** Action BIR

Event ID 2 Event Date 07/21/2020 Status Prepared Class BIR **Event Status Update**

Prepare Options

Enrollment Statement

Run Date

Frequency  
☒ Deduction Frequency ☐ Annual Frequency





# Manual Benefit Events

| BAS Action | Description  | Available in ESS | How is it Created?                               | COBRA Action     |
|------------|--|------------------|--|------------------|
| <b>A26</b> | Covered Child Lost Eligibility – Child turns age 26              | NO               | Manual Event by BA                               | OVG (CH No Elig) |
| <b>BIR</b> | Birth or Adoption  | YES              | Online through Life Events or Manual Event by BA | N/A              |
| <b>DIV</b> | Divorce  | YES              | Online through Life Events or Manual Event by BA | DIV (Divorce)    |
| <b>DGE</b> | Dependent Gained Eligibility with Employer                       | NO               | Manual Event by BA                               | N/A              |
| <b>DLE</b> | Dependent Lost Eligibility with Employer                         | NO               | Manual Event by BA                               | N/A              |
| <b>FSC</b> | Family Status Change – Add dependent to existing family coverage | NO               | Manual Event by BA                               | N/A              |
| <b>HIP</b> | HIPAA Spec Enroll/Loss Coverage                                  | NO               | Manual Event by BA                               | N/A              |
| <b>LEG</b> | Lost Eligibility Government Plan                                 | NO               | Manual Event by BA                               | N/A              |
| <b>LEM</b> | Lost Eligibility Medicare/Medicaid                               | NO               | Manual Event by BA                               | N/A              |
| <b>MAR</b> | Marriage   | YES              | Online through Life Events or Manual Event by BA | N/A              |
| <b>MSR</b> | Medical Support Order - Remove                                   | NO               | Manual Event by BA                               | N/A              |
| <b>MSA</b> | Medical Support Order - Add                                      | NO               | Manual Event by BA                               | N/A              |



# Manual Benefit Events (continued)

| BAS Action | Description  | Available in ESS | How is it Created?          | COBRA Action   |
|------------|--|------------------|-----------------------------|----------------|
| <b>BEN</b> | Benefits Change – OHB Only                               | NO               | Manual Event by BA          | N/A            |
| <b>DCH</b> | Death of Child   | NO               | Manual Event by BA          | N/A            |
| <b>DSP</b> | Death of Spouse  | NO               | Manual Event by BA          | N/A            |
| <b>FSD</b> | Dependent Care Cost/Coverage Chg                         | NO               | Manual Event by BA          | N/A            |
| <b>LAT</b> | LOA Benefits Termination – EE on LOA Job Change Elig 9   | NO               | Manual Event by BA          | N/A            |
| <b>FPP</b> | Failure to Pay Premium – BA cancelled due to non-payment | NO               | Manual Event by BA          | N/A            |
| <b>ADR</b> | Address Change   | YES              | Personal information change | N/A            |
| <b>OE</b>  | Open Enrollment  | YES              | OHB will open schedule      | N/A            |
| <b>ELG</b> | Eligibility Configuration Change                         | NO               | Job Data Change             | N/A            |
| <b>GEM</b> | Gain Eligibility Medicare/caid                           | NO               | Manual Event by BA          | MED (Medicare) |



# Benefit Plan Types

| Plan Type | Description                         |
|-----------|-------------------------------------|
| 10        | Medical                             |
| 23        | Imputed Life                        |
| 46        | 403(b)                              |
| 49        | Section 457                         |
| 4W        | VRS Hybrid Vol Defined Contribution |
| 60        | Flexible Spending Medical           |
| 61        | Flex Spending Dependent Care        |
| 70        | Employee Retirement DB              |
| 7V        | Hybrid Retirement                   |
| 7W        | Group Term Life                     |
| 7X        | Retiree Health Credit               |
| 7Y        | VSDP LTD                            |
| 7Z        | Hybrid Mandatory DC                 |
| AY        | Health Premium Reward               |
| AZ        | Flex Spending Admin Fee             |



**DEMO**



# Enrolling in Benefits Demonstration

Navigation: Benefits Administrator Tile > Benefits Management > On-Demand Event Maintenance > Empl ID Search

Look Up Option Code

Cancel

Search Results

View 100 1-13 of 13

| Option Code | Option Type | Benefit Plan | Coverage Code |
|-------------|-------------|--------------|---------------|
| 12          | Option      | CHA2         | 4             |
| 16          | Option      | CHD          | 4             |
| 20          | Option      | CHD1         | 4             |
| 28          | Option      | ACC0         | 4             |
| 32          | Option      | ACC1         | 4             |
| 36          | Option      | ACC2         | 4             |
| 4           | Option      | CHA          | 4             |
| 40          | Option      | ACC3         | 4             |
| 44          | Option      | ACC4         | 4             |
| 48          | Option      | ACC5         | 4             |
| 56          | Option      | TRC          | 4             |
| 8           | Option      | CHA1         | 4             |
| W           | Waive Optn  | (blank)      | (blank)       |

BenAdmin Data Entry

Event / Participant Selection Option Election Dependents / Beneficiaries

Sched ID EM00 Empl ID Ben Record 0 Event ID 2

Event Data 10/04/2020 Marriage Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 28 COVA Care + Prev Dental (ACC0) (Family)

Health Provider ID Previously Seen

Special Requirements

Enroll All

Dependents/Beneficiaries

| *ID | Name | Relationship to Employee | Health Provider ID | Previously Seen | Covered Person Type | Age Limit Flag |
|-----|------|--------------------------|--------------------|-----------------|---------------------|----------------|
|     |      |                          |                    |                 |                     |                |

Medical Coverage Codes:

- '1' – Single
- '2' – EE + Spouse
- '3' – EE + 1 Child
- '4' – Family



# Enrolling in Benefits Demonstration (continued)

Event / Participant Selection   Option Election   **Dependents / Beneficiaries**

Schedule ID EM00   Employee ID [REDACTED]  
Event ID 2   Event Data 10/04/2020   Marriage  
Benefit Record 0   Excess Credit Rollover To   Forfeit Excess Credits

**Dependent/Beneficiaries Currently on Record**

| Name | Relationship to Employee | Dependent Beneficiary Type | Date of Birth |
|------|--------------------------|----------------------------|---------------|
|      | Child                    | Dependent                  | 08/17/2020    |
|      | Spouse                   | Unapproved Dependent       | 10/31/1990    |

[Change/Add Dependent Data](#)

Click the **Change/Add Dependent Data** link to change the **Dependent Beneficiary Type** field for any Dependents and/or Beneficiaries currently on the employee's record.

Within the **Personal Profile** tab, select the appropriate **Dependent Beneficiary Type** using the drop-down list. Scroll between Dependents/Beneficiaries using the arrows.

Make sure that if the proper documentation has been to submitted by the employee, that the Dependent Beneficiary Type has been changed to **Approved Dependent**.

**Dependent/Beneficiary**

Name   Address   **Personal Profile**   Help

Person ID [REDACTED]

**Personal Profile**   Search   1 of 2   View All

Dependent/Beneficiary ID 01 [REDACTED]   +   -

Date of Birth 12/14/2000   Birth Location   Birth Country   Birth State   ☐ Riders/Orders exist  
Date of Death   Medicare Entitled Date   Riders/Orders

**Personal History**   Search   1 of 1   View All

\*Effective Date 12/14/2020   +   -

\*Relationship to Employee Child

**\*Dependent Beneficiary Type Approved Dependent**

\*Gender Female

\*Marital Status Single   As of 12/14/2020   As of 12/14/2020   As of   As of

☒ Student   ☐ Disabled   ☐ Smoker



# Enrolling in Benefits Demonstration (continued)

After all necessary Dependents and Beneficiaries are added, click the **Enroll All** button to enroll all dependents/beneficiaries or select the **ID Look-Up** icon to add individual dependents/beneficiaries. Click the **Add a New Row** button (+) to add additional dependents/beneficiaries.

**Plan Type 10 : Medical**

Option Code

COVA Care + Prev Dental (ACC0) (Family)

Health Provider ID

☐ Previously Seen

[Special Requirements](#)

**Dependents/Beneficiaries**

Enroll All

**Dependents/Beneficiaries**

| *ID                                 | Name        | Relationship to Employee | Health Provider ID   | Previously Seen          | Covered Person Type | Age Limit Flag                      |                         |
|-------------------------------------|-------------|--------------------------|----------------------|--------------------------|---------------------|-------------------------------------|-------------------------|
| <div><div>01</div><div></div></div> | <div></div> | Child                    | <input type="text"/> | <input type="checkbox"/> | Child               | <input checked="" type="checkbox"/> | <div><div>-</div></div> |
| <div><div>+...</div></div>          |             |                          |                      |                          |                     |                                     |                         |



# Enrolling in Benefits Demonstration (continued)

**Look Up Option Code** ×

Cancel Help

Search Results

View 100 | 1-2 of 2

| Option Code | Option Type | Benefit Plan | Coverage Code |
|-------------|-------------|--------------|---------------|
| 1           | Option      | FLXMED       | (blank)       |
| W           | Waive Optn  | (blank)      | (blank)       |

**Plan Type 60 : Flex Spending Medical**

Option Code  Medical Flex Spending Account (FLXMED)

Annual Pledge

Employee Contribution Override  Monthly

**Contribution Worksheet** ?

Use this worksheet to calculate the employee's desired Annual Pledge and Contribution Amount.

| Annual Pledge                           | Contributions YTD                   | Pay Periods Remaining | Pay Period Amount                    | Employee Contribution                         |
|---|-------------------------------------|-----------------------|--------------------------------------|---|
| <input type="text" value="\$1,000.00"/> | <input type="text" value="\$0.00"/> | 16                    | <input type="text" value="\$62.50"/> | <input type="text" value="\$125.00"/> Monthly |

Open Protected Fields Open protected fields for change. (These fields are normally determined by the system).

[Special Requirements](#)

**Plan Type 61 : Flex Spending Dependent Care**

Option Code

Annual Pledge

Employee Contribution Override

**Contribution Worksheet** ?

[Special Requirements](#)

**Plan Type AZ : Flex Spending Admin Fee**

Option Code

[Special Requirements](#)

OK Cancel Apply Refresh

[Event / Participant Selection](#) | [Option Election](#) | [Dependents / Beneficiaries](#)

**Note:** Cardinal does **not** automatically waive FSA enrollments when an employee has a Life Event change and waives health benefit coverage





# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Finalizing Benefit Event

The **Status** field for the event updates to “**Entered**” after the Benefits are elected. Click the **Validate/Finalize** button to confirm and save the elections to the database.

Cardinal Homepage

Employee/Dependent Information

Enroll in Benefits

Review Employee Benefits

Benefits Management

Review BAS Activity

On-Demand Event Maintenance

Update Event Status

Benefits Administrator

New Window | Help | Personalize Page

On-Demand Event Maintenance

Person ID Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 9 Show Activities Action

Event ID 2 Event Date 10/04/2020 Status Entered Class MAR Event Status Update

Prepare Options Enrollment Statement

Run Date 10/04/2020 Frequency

Deduction Frequency Annual Frequency

Election Entry Entered 3 of 4 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

**Note:** The system will check through all of the rules regarding dependent eligibility and COVA rules to determine if the transaction and elections are valid. At this point errors could appear after clicking on the **Validate/Finalize** button. Depending on the errors different actions need to be taken. For further information on Troubleshooting Errors see the Job Aid titled **BN361 Benefits Quick Reference Guide**. This Job Aid can be found on the Cardinal Website in **Job Aids** under **Training**.



# Finalizing Benefit Event (continued)

The **Event Status** field updates to “**Finalized - Enrolled**”

Cardinal Homepage

Employee/Dependent Information

Enroll in Benefits

Review Employee Benefits

Benefits Management

Review BAS Activity

On-Demand Event Maintenance

Update Event Status

Benefits Administrator

New Window | Help | Personalize Page

On-Demand Event Maintenance

Person ID Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 9 Show Activities Action

Event ID 2 Event Date 10/04/2020 Status Finalized - Enrolled Class MAR Event Status Update

Prepare Options Event Status Closed to Processing

Enrollment Statement Run Date 10/04/2020 Frequency

Deduction Frequency Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

**Note:** Events are processed in the order in which they occur when a participant has multiple unfinalized events (i.e., older events are processed before more recent events). If applicable, click on the **Event Status Update** button to view multiple events.



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Reviewing Benefit Events

This page is used to review the status and processing stage of an event.

**Navigation: Benefits Administrator > Benefits Management > On-Demand Event Maintenance > Empl ID Search**

BenAdmin Event Status Update

Help

Update Event Status

Empl ID

Ben Record 0

Event Status Update ?

1 of 3

Schedule ID EM00

Event Date 12/21/2020

Event ID 3

Event Class DGE Dpdnt Gained Eligibility w ER

Event Priority 440

Benefit Program SAL

Process Status Entered

Action Source Manual Event

☐ Event Disconnected

☐ Address Eligibility Changed

☐ MultiJob Indicator Changed

☐ Job Eligibility Changed

☐ Event Out of Sequence

☐ Finalize/Apply Defaults

Print Option Print Both Forms

\*Process Normal Processing

\*Event Status Open for Processing

Schedule ID EM00

Event Date 12/10/2020

Event ID 2

Event Class BIR Birth or Adoption

Event Priority 410

Benefit Program SAL

Process Status Finalized - Enrolled

Action Source Manual Event

☐ Event Disconnected

☐ Address Eligibility Changed

☐ MultiJob Indicator Changed

☐ Job Eligibility Changed

☐ Event Out of Sequence

☐ Finalize/Apply Defaults

Print Option Print Both Forms

\*Process Normal Processing

\*Event Status Closed to Processing



# Reopening Benefit Event Demonstration

The **Process** and **Event Status** fields determine an employee's Benefits Administration status.

Navigation: **Benefits Administrator > Benefits Management > On-Demand Event Maintenance > Empl ID Search**

To reprocess an event:

- 1. Navigate to the **On-Demand Event Maintenance**.
- 2. Search for the Employee by entering their **Empl ID**
- 3. Click on the **Event Status Update** button
- 4. On the **Event Status Update** page. Find the correct event.
- 5. Set the **Process** status to **"Re-Enter"**
- 6. Set the **Event Status** to **"Open for Processing"**.
- 7. Click the **OK** button to return to the **On-Demand Event Maintenance** page.
- 8. Click the **Save** button, and then click the **Reprocess** button.
- 9. Now complete the updated enrollments by clicking on the **Election Entry** button.

Event Status Update ?

Schedule ID

EM00

Event Date

06/01/2021

Event ID

1

Event Class

MAR Marriage

Event Priority

420

Benefit Program

SAL

Process Status

Finalized - Enrolled

Action Source

Manual Event

☐ Event Disconnected

☐ Address Eligibility Changed

☐ MultiJob Indicator Changed

☐ Job Eligibility Changed

☐ Event Out of Sequence

☐ Finalize/Apply Defaults

Print Option

Print Both Forms

\*Process

Re-Enter

\*Event Status

Open for Processing



**DEMO**





# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. Where do you go on the On-Demand Event Maintenance Page to reopen a benefit event?
- |                              |                        |
|------------------------------|------------------------|
| A. Prepare Options           | B. Event Status Update |
| C. Schedule/Prepare Activity | D. Election Entry      |



2. What would the **status** be on the event for an employee who has already enrolled in benefits through ESS and the Benefit Administration Admin has run?
- |                       |            |
|-----------------------|------------|
| A. Finalized/Enrolled | B. Updated |
| C. Open               | D. Closed  |



3. What page on the Benefit Administration tile is used to add manual events?
- |                               |                                     |
|-------------------------------|-------------------------------------|
| A. Enroll in Benefits         | B. On-Demand Event Maintenance Page |
| C. Review Employee Statements | D. Review BAS Activity              |



# Lesson Summary

2

## On-Demand Event Maintenance Page

In this lesson, you learned

- How to use the On-Demand Event Maintenance Page when working with Benefit Events in the following capacity:
  - Create Events
  - Adding a Manual Event
  - Review Events
  - Approving a Dependent
  - Enroll in Benefits
  - Reopen Events
  - Finalizing Events



# Lesson

3

## Benefit Plan Elections

This lesson covers the following topics:

- Understanding how the following Benefit Plan elections get submitted to Cardinal:
  - Health & FSA elections
  - Premium Reward
  - Retirement Plans
  - Deferred Compensation & Annuity



# Health & FSA elections

Employees submit Health Benefit and FSA elections directly through ESS. Alternatively, the Agency BA can submit these elections through the **On-Demand Event Maintenance** page. The information populates in the employee's Base Benefits after elections are finalized.

**Navigation:** Navigator > Benefits > Enroll in Benefits

## > Health Benefits

**Health Benefits**

Employee ID: [redacted] Benefit Record Number: 0

Plan Type: 10 Medical

Coverage: \*Coverage Begin Date: 11/01/2019 \*Deduction Begin Date: 10/25/2019

Coverage Election: ☒ Elect ☐ Waive ☐ Terminate \*Election Date: 05/04/2020

Benefit Program: ACC2 Coverage Code: 1 Single Health Provider ID: [redacted] ☐ Previously Seen

Employee Status: [redacted] [Enroll All Dependents](#)

Dependent/Beneficiaries

| ID | Name | Relationship to Employee | Health Provider ID | Prev Seen | Covered Person Type | Age Limit Flg |
|----|------|--------------------------|--------------------|-----------|---------------------|---------------|
|    |      |                          |                    |           |                     |               |

## > Spending Account

**Spending Accounts**

Employee ID: [redacted] Benefit Record Number: 0

Plan Type: 60 Flex Spending Medical

Coverage: \*Coverage Begin Date: 11/01/2019 \*Deduction Begin Date: 10/25/2019

Coverage Election: ☒ Elect ☐ Waive ☐ Terminate \*Election Date: 05/04/2020

Benefit Program: FLXMED

Contribution Level: Annual Pledge: \$500.00 Credit Rollover Included in Pledge: \$0.00 [Calculate](#) Employee Contribution Amount: [redacted] Monthly

Account Information: FSA Account Status: Active Contributions YTD: \$0.00

Carryforward: Carryover Amount: 0.00

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)



# Review Premium Reward Benefit Elections

**Navigation:** Navigator > Benefits > Enroll in Benefits > Simple Benefits

The Premium Rewards File upload is centrally processed

- Participants are included in the Premium Reward file received by Cardinal if they satisfy the requirements to earn the premium reward.
- The Premium Rewards file is automatically uploaded, and the participant is enrolled in the Simple Benefit plan. An additional pay is established to offset the cost of the medical premium.
- If the Additional Pay needs to be manually updated for an employee, reach out the HR Administrator to make the adjustments necessary.

Employee ID Benefit Record Number 0

Plan Type

1 of 2 View All

Plan Type AY

Health Premium Reward

+ -

Coverage

1 of 1 View All

Coverage Begin Date 07/01/2019

\*Deduction Begin Date 07/01/2019

+ -

Coverage Election

☒ Elect

☐ Waive

☐ Terminate

\*Election Date 09/16/2020

Benefit Program SAL Salaried Employee Benefit Pgm

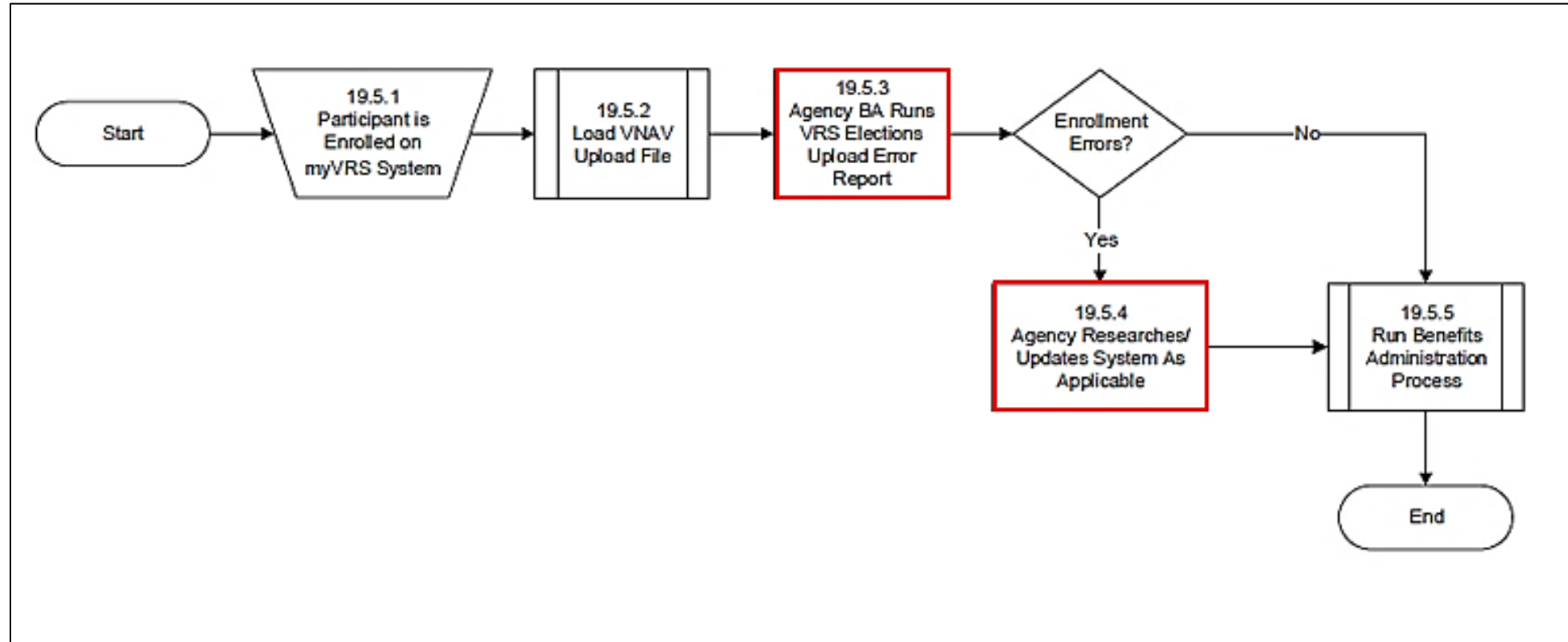
Benefit Plan PRWDEE Premium Reward Par Only



**DEMO**



# Retirement Process Flow







# Retirement Plan Enrollment

1. Enrollment for the Participant occurs in myVRS System
2. Load VNAV Upload File
  - a. Cardinal automatically uploads file
  - b. Updates employee Job Records with respective Action/Action Reasons assigned to upload
  - c. Stores Retirement Plan Code in **Eligibility Field 1** on **Benefit Program Participation** page
  - d. Stores VRS Organization Code in **Eligibility Field 6** on **Benefit Program Participation** page
  - e. Creates Benefits Event when Job Data is updated on individual employee's Job Record
  - f. Review Benefits Event information through **On-Demand Event Maintenance** page
3. Agency BA runs VRS Elections Upload Error Report
  - a. Reports rejected for errors such as:
    - i. Employee record not found
    - ii. Employee terminated
    - iii. Wage employee not eligible

**Note:** For further information on troubleshooting Error Reports, see the Job Aid titled **BN361 Benefit Upload Error Reports Troubleshooting**. This Job Aid can be found on the Cardinal Website in **Job Aids** under **Training**.

In addition, for further information on Eligibility Configuration Fields, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal Website in **Job Aids** under **Training**.



# VRS Elections Upload Error Report

Below is an example of the VRS Elections Upload Error Report:

| Commonwealth of Virginia  |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
|---|-------------|-----------------------------------|--------------|-------------|-------------|---------|-------------|--------------|-------------|-------------|-----------|------|-----|---------|-----------|--|----------|--------------|-------------|----------|---------|------------|--------------|-----------|-------------|-----------|-------------|------------|------------|----------|---------|------------|-------------|-------------|-------------|-------------|-------------------------------|------|-------------|-------------|-----|-------------|-------------|------|-----------------------------------|------|-------|------------|------|----|------------|-------|---|--|------|-------|------|-------------|---|--------------------------------|-----|-----|------------|---|----|------------|-------|---|--|------|--|------|
| VNAV ELECTIONS UPLOAD ERROR REPORT  |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Run Date: 12/18/2020  |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Run Time: 01:52 00  |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Report ID: RHR149   |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Company: BCC-Bland Correctional Center  |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| From Date: 12/18/2020   |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| To Date: 12/18/2020   |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Page No. 2 of 5   |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Transaction Errors. Online Entry Required   |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| <table><thead><tr><th colspan="3">Empl</th><th colspan="2">Payroll VNAV</th><th colspan="2">VOL</th><th colspan="2">PSBB</th><th colspan="2">PSBB</th><th colspan="2">PSBB PSBB</th></tr><tr><th>Emplid</th><th>Rcd</th><th>Name</th><th>Company</th><th>Department</th><th>Hire Date</th><th>Status</th><th>Plan</th><th>EFFDT</th><th>PCT</th><th>VSDP</th><th>CODE</th><th>AMNT</th><th>ADJ</th><th>ADJ AMT</th></tr></thead><tbody><tr><td>00900006900</td><td>0</td><td>T02BN1922,Employee 20 RER ICMA-RC</td><td>BCC</td><td>100</td><td>10/15/2019</td><td>A</td><td></td><td>12/01/2020</td><td>0.00%</td><td></td><td></td><td>0.00</td><td></td><td>0.00</td></tr></tbody></table>  |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         | Empl      |  |          | Payroll VNAV |             | VOL      |         | PSBB       |              | PSBB      |             | PSBB PSBB |             | Emplid     | Rcd        | Name     | Company | Department | Hire Date   | Status      | Plan        | EFFDT       | PCT                           | VSDP | CODE        | AMNT        | ADJ | ADJ AMT     | 00900006900 | 0    | T02BN1922,Employee 20 RER ICMA-RC | BCC  | 100   | 10/15/2019 | A    |    | 12/01/2020 | 0.00% |   |  | 0.00 |       | 0.00 |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Empl  |             |                                   | Payroll VNAV |             | VOL         |         | PSBB        |              | PSBB        |             | PSBB PSBB |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Emplid  | Rcd         | Name                              | Company      | Department  | Hire Date   | Status  | Plan        | EFFDT        | PCT         | VSDP        | CODE      | AMNT | ADJ | ADJ AMT |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| 00900006900   | 0           | T02BN1922,Employee 20 RER ICMA-RC | BCC          | 100         | 10/15/2019  | A       |             | 12/01/2020   | 0.00%       |             |           | 0.00 |     | 0.00    |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| <b>Error Message</b>  |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| File has missing VRS Plan Code  |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| <table><thead><tr><th colspan="2">Plan Type</th><th>Coverage</th><th>Deduction</th><th>Participant</th><th>Election</th><th>Benefit</th><th>Before Tax</th><th>Before Tax %</th><th>After Tax</th><th>After Tax %</th></tr><tr><th>Plan</th><th>Flat Amount</th><th>Begin Date</th><th>Begin Date</th><th>Election</th><th>Date</th><th>Plan</th><th>Flat Amount</th><th>of Earnings</th><th>Flat Amount</th><th>of Earnings</th></tr></thead><tbody><tr><td>-</td><td>0.00</td><td></td><td></td><td></td><td></td><td></td><td>0.00</td><td>0.00%</td><td>0.00</td><td>0.00%</td></tr></tbody></table>  |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         | Plan Type |  | Coverage | Deduction    | Participant | Election | Benefit | Before Tax | Before Tax % | After Tax | After Tax % | Plan      | Flat Amount | Begin Date | Begin Date | Election | Date    | Plan       | Flat Amount | of Earnings | Flat Amount | of Earnings | -                             | 0.00 |             |             |     |             |             | 0.00 | 0.00%                             | 0.00 | 0.00% |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Plan Type   |             | Coverage                          | Deduction    | Participant | Election    | Benefit | Before Tax  | Before Tax % | After Tax   | After Tax % |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Plan  | Flat Amount | Begin Date                        | Begin Date   | Election    | Date        | Plan    | Flat Amount | of Earnings  | Flat Amount | of Earnings |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| -   | 0.00        |                                   |              |             |             |         | 0.00        | 0.00%        | 0.00        | 0.00%       |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| <table><thead><tr><th colspan="3">Empl</th><th colspan="2">Payroll VNAV</th><th colspan="2">VOL</th><th colspan="2">PSBB</th><th colspan="2">PSBB</th><th colspan="2">PSBB PSBB</th></tr><tr><th>Emplid</th><th>Rcd</th><th>Name</th><th>Company</th><th>Department</th><th>Hire Date</th><th>Status</th><th>Plan</th><th>EFFDT</th><th>PCT</th><th>VSDP</th><th>CODE</th><th>AMNT</th><th>ADJ</th><th>ADJ AMT</th></tr></thead><tbody><tr><td>00923561300</td><td>0</td><td>T02BN1929,Employee 07 RER_VNAV</td><td>BCC</td><td>100</td><td>08/25/2020</td><td>A</td><td>4W</td><td>11/16/2020</td><td>1.00%</td><td>Y</td><td></td><td>0.00</td><td></td><td>0.00</td></tr><tr><td>00923561300</td><td>0</td><td>T02BN1929,Employee 07 RER_VNAV</td><td>BCC</td><td>100</td><td>08/25/2020</td><td>A</td><td>HB</td><td>11/16/2020</td><td>0.00%</td><td>Y</td><td></td><td>0.00</td><td></td><td>0.00</td></tr></tbody></table> |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         | Empl      |  |          | Payroll VNAV |             | VOL      |         | PSBB       |              | PSBB      |             | PSBB PSBB |             | Emplid     | Rcd        | Name     | Company | Department | Hire Date   | Status      | Plan        | EFFDT       | PCT                           | VSDP | CODE        | AMNT        | ADJ | ADJ AMT     | 00923561300 | 0    | T02BN1929,Employee 07 RER_VNAV    | BCC  | 100   | 08/25/2020 | A    | 4W | 11/16/2020 | 1.00% | Y |  | 0.00 |       | 0.00 | 00923561300 | 0 | T02BN1929,Employee 07 RER_VNAV | BCC | 100 | 08/25/2020 | A | HB | 11/16/2020 | 0.00% | Y |  | 0.00 |  | 0.00 |
| Empl  |             |                                   | Payroll VNAV |             | VOL         |         | PSBB        |              | PSBB        |             | PSBB PSBB |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Emplid  | Rcd         | Name                              | Company      | Department  | Hire Date   | Status  | Plan        | EFFDT        | PCT         | VSDP        | CODE      | AMNT | ADJ | ADJ AMT |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| 00923561300   | 0           | T02BN1929,Employee 07 RER_VNAV    | BCC          | 100         | 08/25/2020  | A       | 4W          | 11/16/2020   | 1.00%       | Y           |           | 0.00 |     | 0.00    |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| 00923561300   | 0           | T02BN1929,Employee 07 RER_VNAV    | BCC          | 100         | 08/25/2020  | A       | HB          | 11/16/2020   | 0.00%       | Y           |           | 0.00 |     | 0.00    |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| <b>Error Message</b>  |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Election was rejected because the current record in Cardinal has a newer EFFDT than the transaction on the file.  |             |                                   |              |             |             |         |             |              |             |             |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
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| Plan Type   |             | Coverage                          | Deduction    | Participant | Election    | Benefit | Before Tax  | Before Tax % | After Tax   | After Tax % |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| Plan  | Flat Amount | Begin Date                        | Begin Date   | Election    | Date        | Plan    | Flat Amount | of Earnings  | Flat Amount | of Earnings |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| 4W - VRS Hb Vol Defined Contr   | 0.00        | 01-DEC-2020                       | 25-NOV-2020  | E           | 11-DEC-2020 | HVC150  | 0.00        | 1.50%        | 0.00        | 0.00%       |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |
| HB -  | 0.00        |                                   |              |             |             |         | 0.00        | 0.00%        | 0.00        | 0.00%       |           |      |     |         |           |  |          |              |             |          |         |            |              |           |             |           |             |            |            |          |         |            |             |             |             |             |                               |      |             |             |     |             |             |      |                                   |      |       |            |      |    |            |       |   |  |      |       |      |             |   |                                |     |     |            |   |    |            |       |   |  |      |  |      |



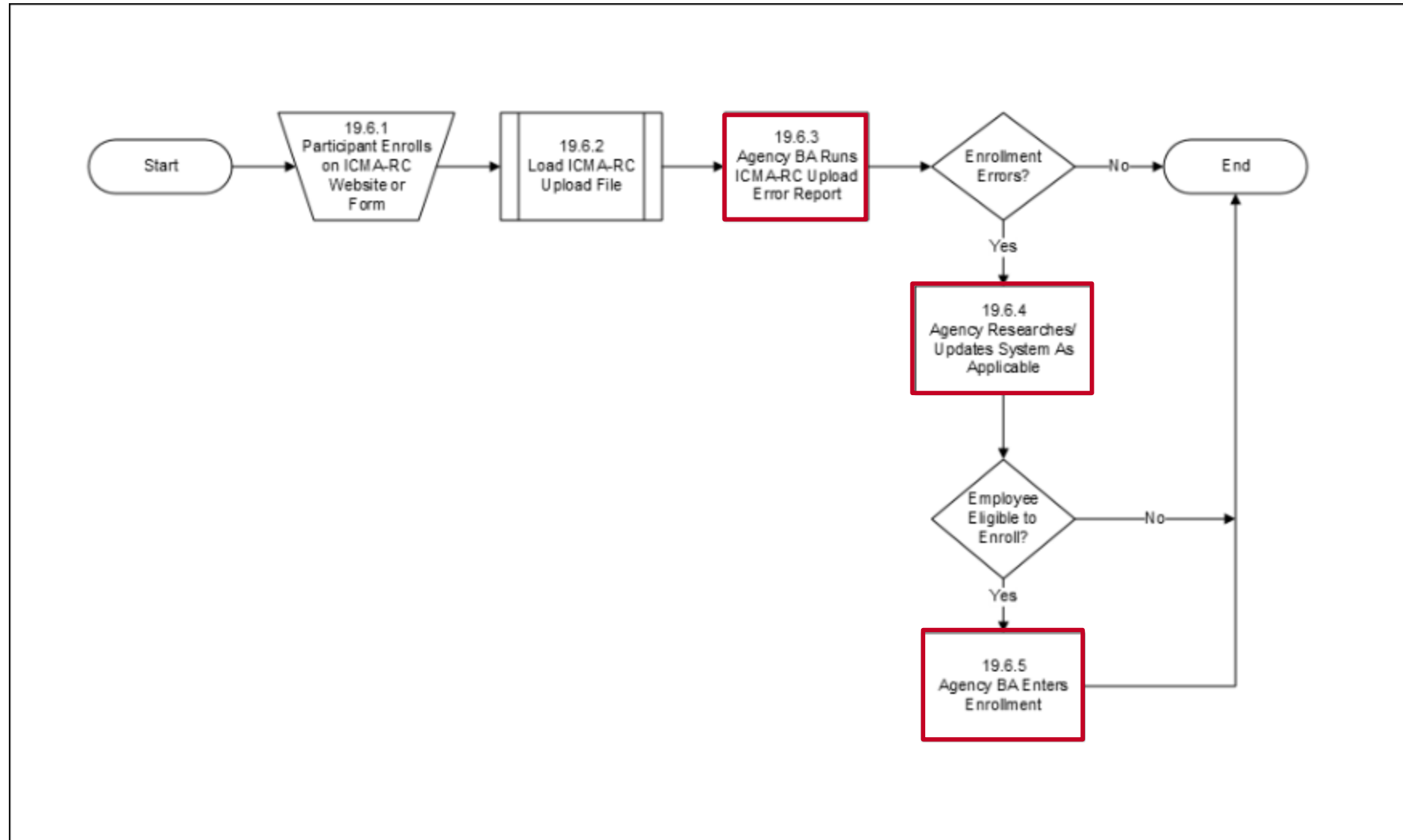
# Retirement Plan Enrollment (continued)

4. Agency researches/updates Cardinal
  - a. Research errors and determine appropriate corrective action(s) for every action listed on VRS Elections Upload Error Report
  - b. Update **Eligibility Field 1** and **Eligibility Field 6** with correct values (as required) to create Benefits Event and complete enrollment
5. Run Benefits Administration Process
  - a. Automated Event Processing Program evaluates events created in Step 4, evaluates employee eligibility, and enrolls employee into correct retirement plan

**Note:** For more information on employees that opt to retire with an Optional Retirement Plan please refer to the HR351 Separation Statuses Job Aid. This Job Aid can be found on the Cardinal Website in **Job Aids** under **Training**.



# Deferred Compensation Process Flow





# Deferred Compensation Supplement

Cardinal stores employees' deferred compensation plan elections to maintain payroll deductions. The International City Management Association Retirement Corporation (ICMA-RC) is the vendor that manages the deferred compensation supplement system of record. VRS is the state agency responsible for managing COVA's relationship with ICMA-RC.

1. Participant enrolls on ICMA-RC website or form
2. ICMA-RC Upload File is automatically loaded
  - a. The upload will evaluate the eligibility for the cash match based upon retirement enrollment
  - b. ICMA-RC automatically updates individual employee deferred compensation supplement elections on **Savings Plan Table** on **Cardinal Base Benefits** page
3. Agency BA runs ICMA-RC Upload Error Report
  - a. Identifies changes from ICMA-RC Report not successfully updated into Cardinal
4. Agency BA enters enrollment on the **Review BAS Activity** page
  - a. Create event (ELG BAS Action) on **Review BAS Activity** page to open enrollment options and enroll employee in Deferred Compensation (Plan Type 49)



# ICMA-RC Upload Error Report

Below is an example of an ICMA-RC Upload Error Report:

Report ID: RHR148

Commonwealth of Virginia

ICMA-RC UPLOAD ERROR REPORT

Run Date: 01/04/2021

Run Time: 12:17 00

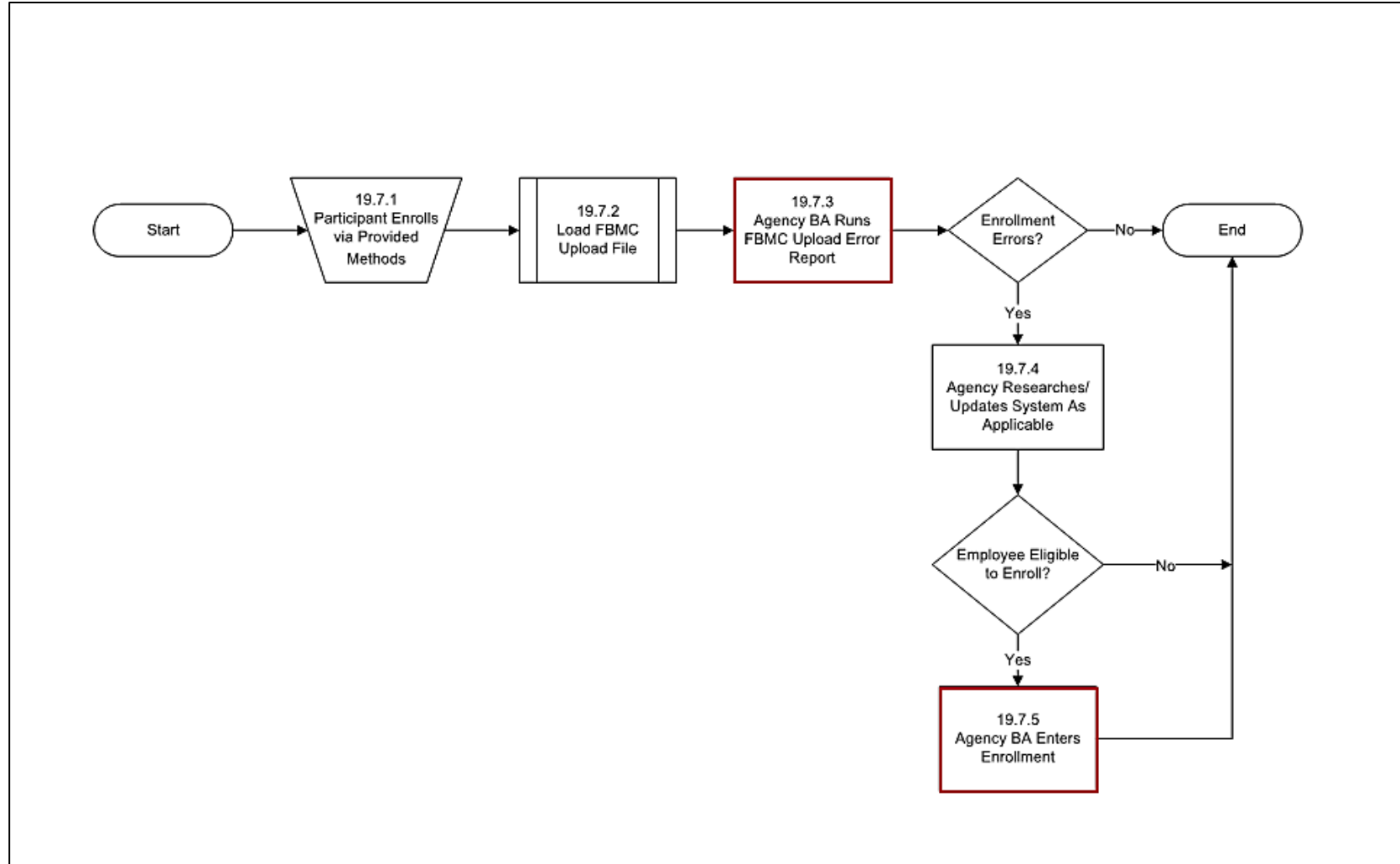
EFFECTIVE DATE - 11/01/2020

Page No. 1 of 1

| <u>CMP</u> | <u>EMPLID</u> | <u>NAME</u>            | <u>BEN<br/>PLAN</u> | <u>COVG<br/>ELCT</u> | <u>PRE-TAX<br/>AMOUNT</u> | <u>POST-TAX<br/>AMOUNT</u> | <u>EPF<br/>DATE</u> | <u>PLN<br/>TYP</u> | <u>MNTH-PAYS</u> | <u>ERR<br/>TYP</u> | <u>ERROR<br/>MSG</u>   |
|------------|---------------|------------------------|---------------------|----------------------|---------------------------|----------------------------|---------------------|--------------------|------------------|--------------------|--|
| DGS        |               | BadNID, BadEmplid      | 457P24              | E                    | 25,000.00                 | 0.00                       | 11/01/2020          | 49                 |                  | E                  | ERROR: Election Not Processed No EMPLID or SSN Found on incoming file  |
| DGS        |               | BadNID, BadEmplid      | 457P24              | E                    | 25,000.00                 | 0.00                       | 11/01/2020          | 49                 |                  | E                  | Employee ID does not exist in BEN_PROG_PARTIC record.  |
| DGS        |               | BadNID, BadEmplid      | 457P24              | E                    | 25,000.00                 | 0.00                       | 11/01/2020          | 49                 |                  | E                  | Warning - No benefit plan found for employee Months and Pay Periods value on Job. Election loaded using default of value, 12-24. Verify and correct Months and Pay Periods. Update 457 plan election if necessary. |
| DGS        | 00923561800   | T02BN1922, Employee 01 | 457P24              | E                    | 1,500.00                  | 0.00                       | 11/01/2020          | 49                 |                  | E                  | The Company associated with the Employee in the file is different from PS_JOB  |
| DGS        | 00923561800   | T02BN1922, Employee 01 | 457P24              | E                    | 1,500.00                  | 0.00                       | 11/01/2020          | 49                 |                  | E                  | ERROR: Employee Status Terminated  |
| DGS        | 00923561800   | T02BN1922, Employee 01 | 457P24              | E                    | 1,500.00                  | 0.00                       | 11/01/2020          | 49                 |                  | E                  | Warning - No benefit plan found for employee Months and Pay Periods value on Job. Election loaded using default of value, 12-24. Verify and correct Months and Pay Periods. Update 457 plan election if necessary. |
| DGS        | 00923561900   | T02BN1922, Employee 02 | 457P24              | E                    | 1,500.00                  | 0.00                       | 11/01/2020          | 49                 | 12-24            | W                  | Processing Note: Employee on LOA/Suspension. Election uploaded   |



# Annuity Process Flow





# Annuity Plans Administration

Annuity plans are administered by the Fringe Benefits Management Company (FBMC). Cardinal stores employees' annuity plan elections to maintain payroll deductions.

1. Participant enrolls via provided methods
  - a. Continue current enrollment process
  - b. FBMC submits upload file to Cardinal to process changes
2. FBMC Upload File is automatically loaded
  - a. The upload will evaluate the eligibility for the cash match based upon retirement enrollment.
  - b. Automatically updates annuity elections on **Savings Plan Table** in **Cardinal Base Benefits**
3. Agency BA runs the FBMC Upload Error Report
  - a. Identifies changes from FBMC Report not successfully updated into Cardinal
4. Agency BA enters enrollment using the **Review BAS Activity** page
  - a. Create event (ELG BAS Action) on **Review BAS Activity** page to open enrollment options and enroll employee in annuity (Plan Type 46)





# FBMC Upload Error Report

Below is an example of an FBMC Upload Error Report:

Records

FBMC Upload Error Report

Run Control ID FBMCUpload

Report Manager Process Monitor

Run

FBMC Upload Error Report

Report Filters

\*Effective Date From06/01/2020

\*Effective Date To06/23/2020

☒ State Payroll Office Totals

PersonalizeFindView All

First1 of 1Last

| Company | Description                    |
|---------|--------------------------------|
| 1 DJJ   | Department of Juvenile Justice |

Save

Process Scheduler Request

User ID

Run Control ID FBMCUpload

Server Name

Run Date06/23/2020

Recurrence

Run Time3:00:15PM

Reset to Current Date/Time

Time Zone

Process List

| Select                              | Description              | Process Name | Process Type | *Type | *Format | Distribution |
|-------------------------------------|--------------------------|--------------|--------------|-------|---------|--------------|
| <input checked="" type="checkbox"/> | FBMC Upload Error Report | VHRR0147     | SQR Report   | Web   | PDF     | Distribution |

OK

Cancel



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. Employees can enroll in the “post-employment” benefits covered in this lesson through Employee Self Service.
  - a) True
  - b) False



2. What are the 3 Upload Error Reports involved in Post-Employment Benefits?



# Lesson Summary

3

## Benefit Plan Elections

In this lesson, you learned

- How the following Benefit Plan elections get submitted to Cardinal:
  - Health & FSA elections
  - Premium Reward
  - Retirement Plans
  - Deferred Compensation & Annuity



# Lesson

4

## Benefit Summaries & Confirmation Statements

This lesson covers the following topics:

- Overview of Benefit Summaries
- Overview of Confirmation Statements



# Benefit Summary

The **Benefits Summary** page can be accessed from both the **Benefit Detail** and **Benefit Administrator** tiles.

Benefits Administrator

Home

Search

Flag

Employee/Dependent Information

Enroll in Benefits

Review Employee Benefits

Current Benefits Summary

Savings Plans

Approve Document Upload

Review Employee Statements

Benefits Management

Primary Empl Record 0

Benefits System Benefits Administration

Benefit Program SAL Salaried Employee Benefit Pgm

Benefits Status Active

Current Enrollments

| Plan Type                    | Coverage Election | Benefit Plan | Description | Coverage or Participation | Coverage Begin |  |
|------------------------------|-------------------|--------------|-------------|---------------------------|----------------|--|
| Medical                      | Elect             | KP           | Kaiser      | Single                    | 07/01/2020     |  |
| Imputed Life                 | Elect             | IMPLIF       | IMP LIF     | Salary X 2                | 07/01/2020     |  |
| 403(b)                       | Waive             |              |             | Waived                    | 07/01/2020     |  |
| Section 457                  | Waive             |              |             | Waived                    | 07/01/2020     |  |
| Flex Spending Medical        | Elect             | FLXMED       | Med FSA     | \$1000 Pledge             | 07/01/2020     |  |
| Flex Spending Dependent Care | Waive             |              |             | Waived                    | 07/01/2020     |  |
| Flex Spending Admin Fee      | Elect             | FLXFEE       | FSA AdmFee  |                           | 07/01/2020     |  |

Return to Search



# Confirmation Statements

The Agency BA can view and print Confirmation Statements. Each Benefit Event creates a new Confirmation Statement.

When an employee performs Benefit Enrollments and/or submits a Life Event, the Agency BA can review the employee's Confirmation Statements.

- Confirmation Statements are created and run as batch jobs.
- The Agency BA has access to view/print their employees' Confirmation Statements.
- The Benefit Confirmation Statements list the participants' recent benefit elections and the per-pay-period costs.
- The participant submits a marked-up Confirmation Statement to the Agency BA for review if any changes are required. The Agency BA would update the enrollment to have a new statement generated.
- Federally mandated health benefit notice language is included in the printed Confirmation Statements.





# Accessing Employee Benefit Statements

Navigation: Benefit Administrator Tile > Review Employee Benefits > Review Employee Statements

Employee/Dependent Information

Enroll in Benefits

Review Employee Benefits

Current Benefits Summary

Savings Plans

Approve Document Upload

Review Employee Statements

Benefits Management

Benefits Configuration

## Review Employee Statements

Search Options

Employee ID (begins with)

Empl Record =

Name (begins with)

Last Name (begins with)

Search

Clear

Homepage

Benefits Administrator

Employee/Dependent Information

Enroll in Benefits

Review Employee Benefits

Current Benefits Summary

Savings Plans

Approve Document Upload

Review Employee Statements

Benefits Management

## Review Employee Statements

Search Options

Employee ID (begins with)

Empl Record =

Name (begins with)

Last Name (begins with)

Search

Clear

Select Employees

1 row

| Name / Title                | Employee ID | Empl Record |
|-----------------------------|-------------|-------------|
| Rob T01BN1903<br>Instructor |             | 0           |



# Viewing Benefit Statements by Event Date

A list of Benefit Statements are displayed by **Event Date**. The Agency BA selects the appropriate Confirmation Statement.

**Navigation:** Benefit Administrator Tile > Review Employee Benefits > Review Employee Statements

Back

Benefits Administrator

Home

Employee/Dependent Information

Enroll in Benefits

Review Employee Benefits

Current Benefits Summary

Savings Plans

Approve Document Upload

Review Employee Statements

Benefits Management

Person ID

Security Officer III

Return to Select Employee

Benefit Record 0

Review Employee Statements

Statement Type

5 rows

| Event Date | Issue Date            | Seq | Enrollment Event  | Statement Type       |  |
|------------|-----------------------|-----|-------------------|----------------------|--|
| 11/13/2020 | 11/13/2020 2:59:34PM  | 0   | Event Maintenance | Submitted Enrollment |  |
| 11/09/2020 | 11/09/2020 2:55:46PM  | 1   | Event Maintenance | Submitted Enrollment |  |
| 11/01/2020 | 11/09/2020 12:42:50PM | 0   | Event Maintenance | Submitted Enrollment |  |
| 11/01/2020 | 11/06/2020 2:25:15PM  | 0   | Event Maintenance | Submitted Enrollment |  |
| 10/04/2020 | 10/04/2020 4:28:08PM  | 0   | Event Maintenance | Submitted Enrollment |  |



# Printing Benefit Statement Selected

Click on the **Expand All** button to see the entire statement online. Click the **Print View** button to display a printable PDF version of the Confirmation Statement.

Benefits Statement

Statement Type Confirmation Statement

Description Event Maintenance

Enrollment Effective Date 11/10/2019

Statement Issue Date 07/09/2020

Print View

This statement confirms your Event Maintenance benefit selections and pay period costs, dependent information, and beneficiary information. If an error has been made in recording your elections, please contact your benefits administrator. These coverages will remain in effect until the next Benefits Open Enrollment or you experience a change in family status or employment situation. Please keep the statement for your records.

Statement Sections

Expand All

Personal Information

Cost Summary


Election Summary



Dependents and Beneficiaries




Investment Allocations



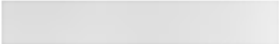
# Email Notification Sent to Employee

**Benefits Confirmation Available** 



 **PeopleSoft@peoplesoft.com**  
to me 

Tue, Feb 4, 11:06 AM   

This email is to confirm that the Benefits Department has confirmed your benefits enrollment. Your Benefits Confirmation Statement has been posted on the Employee Self Service website.

Employee ID: 

[View Online Statement](#)

 Reply  Forward



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. Benefit Administrators are only able to see the most recent Confirmation Statement for each employee.
  - a) True
  - b) False



2. Benefit Administrators can create the Confirmation Statements.
  - a) True
  - b) False



# Lesson Summary

4

## Benefit Summaries & Confirmation Statements

In this lesson, you learned

- How to access and review Benefit Summaries
- How to access and review Confirmation Statements





# Lesson

5

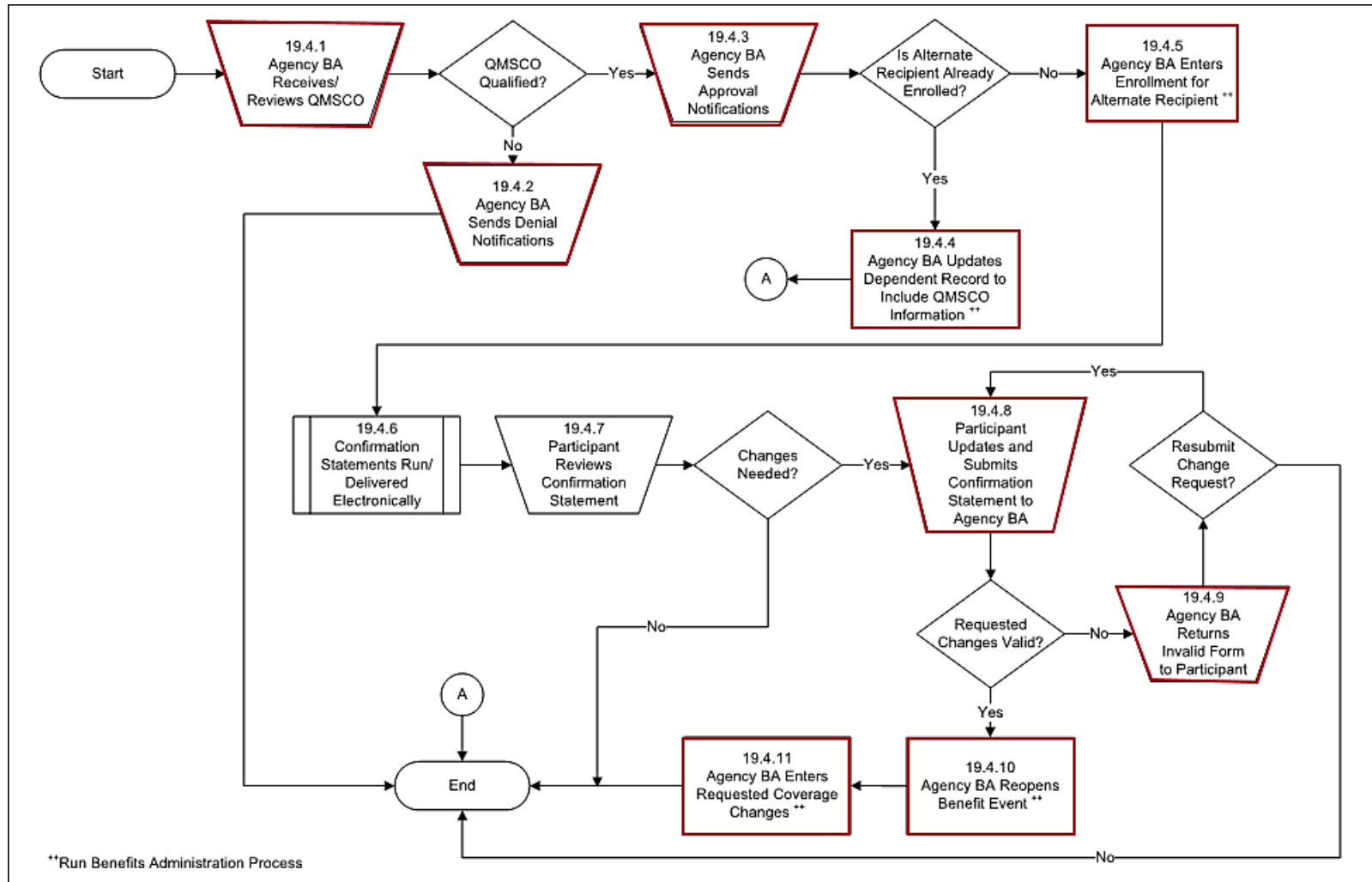
## QMCSO Administration

This lesson covers the following topics:

- Overview on how to administer QMCSO



# QMCSO Process Flow





# QMCSO Administration

A Qualified Medical Court Support Order (QMCSO) requires the employer group health plan to extend health coverage to a child of an eligible participant. A QMCSO can be in the form of either a Medical Child Support Order or a National Medical Support Notice (NMSN). The term QMCSO is used to represent both types throughout this presentation.

1. Agency BA receives and reviews QMCSO (outside of Cardinal)
  - a. Notify participant
  - b. Determines if QMCSO meets necessary legal requirements
2. Agency BA determines if employee is employed at the Agency
  - a. Confirm (or deny) active employment through employee's **Job Record** page
  - b. If employee is terminated, return process needs to be completed.
3. Agency BA confirms (or denies) child is currently listed as a dependent on employee's record.
  - a. Add child as dependent if required
4. Agency BA determines if adding the coverage would violate FLSA
  - a. Work with payroll to determine if required employee contribution to extend health coverage to child can be withheld from the participant's wages without violating applicable Federal and State limitations on withholding or withholding prioritization laws
  - b. Notify Court or issuing Agency if withholding limits prevent withholding necessary employee contributions



# Add QMCSO to corresponding Dependent Demonstration

The **Riders/Orders Exist** checkbox automatically populates after the **Riders/Orders** link is manually updated

**Navigation:** Benefits Administrator Tile > On-Demand Event Maintenance Page > Election Entry > Dependent/Beneficiary tab > Change/Add Dependent Data > Personal Profile > Riders/Orders

The screenshot displays the 'Dependent/Beneficiary' application window. At the top, there are tabs for 'Name', 'Address', and 'Personal Profile', with 'Personal Profile' being the active tab. Below the tabs, there is a 'Person ID' field. The main section is titled 'Personal Profile' and contains several input fields: 'Date of Birth' (12/14/2000), 'Birth Country', 'Date of Death', 'Medicare Entitled Date', 'Birth Location', and 'Birth State'. A checkbox labeled 'Riders/Orders exist' is present, and a link labeled 'Riders/Orders' is highlighted with a red box. Below this is the 'Personal History' section, which includes fields for '\*Effective Date' (12/14/2020), '\*Relationship to Employee' (Child), '\*Dependent Beneficiary Type' (Approved Dependent), '\*Gender' (Female), and '\*Marital Status' (Single). There are also checkboxes for 'Student', 'Disabled', and 'Smoker', and 'As of' date fields.

**Note:** The Agency BA must first add a Manual Event with the **BAS Action: MSA** to be able to add a QMCSO to a dependent. Then all changes to dependent/beneficiary data should be done through the **On-Demand Event Maintenance Page**.



# Benefit Enrollment Change with QMCSO Demonstration

Select the applicable **Plan Type**, **Start Date**, and **Exception Type**. All other fields are optional.

Dependent/Beneficiary Riders

Help

Employee ID Dependent/Beneficiary ID 03

Riders/Orders

1 of 1

View All

\*Plan Type10Medical

\*Start Date12/01/2020

StateVAVirginia

Exception TypeCourt Order

Comment

\*Sequence1

End Date11/30/2021

StatusActiveInactive

Court Order Number

+

-

OK

Cancel



## QMCSO Administration (continued)

5. Send Denial/Approval Notifications (outside of Cardinal)
  - a. Agency BA provides notification to court or issuing agency and participant that the QMCSO is (or is not) qualified
    - i. Includes explanation of denial (e.g., defective or missing information)
  - b. Court or issuing agency may submit new or revised QMCSO to Agency BA
6. Enter enrollments for the child
  - a. Agency BA manually enters an online transaction into **Benefits Activity Table** via **On-Demand Event Maintenance** page to extend required health coverage to child
7. Update Dependent Record to include QMCSO information
  - a. Agency BA inputs QMCSO information into child's Dependent Record if child is already enrolled under participant's coverage
8. Confirmation Statements automatically run and electronically delivered to participant
  - a. Notification automatically sent for employee to review Confirmation Statements through ESS
  - b. Participant submits marked-up Confirmation Statement to Agency BA if any changes required

**Note:** The Agency BA is the only role authorized to modify the QMCSO exception types in Cardinal.



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.







# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make Note of your answer below.



1. A QMCSO event (MSA or MSR) can be established by a Job or Personal data change?
  - a) True
  - b) False



# Lesson Summary

5

## QMCSO Administration

In this lesson, you learned

- How to administer QMCSO
- How to add QMCSO to corresponding Dependent
- How to complete benefit enrollment changes for employee with valid QMCSO



# Lesson

6

## COBRA Administration

This lesson covers the following topics:

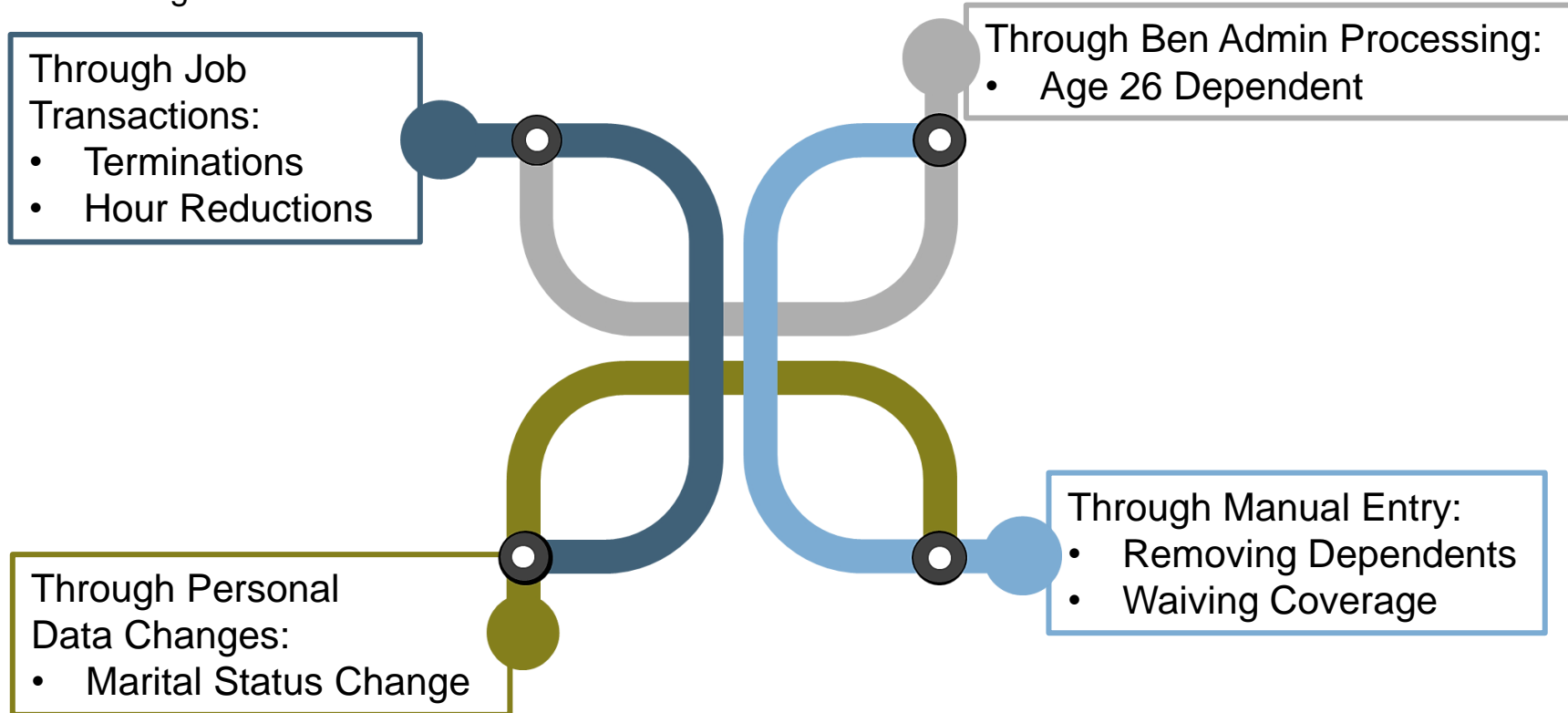
- How to administer COBRA



# Administering COBRA and the COBRA Triggers

COBRA processing is centralized and handled by the Office of Health Benefits (OHB):

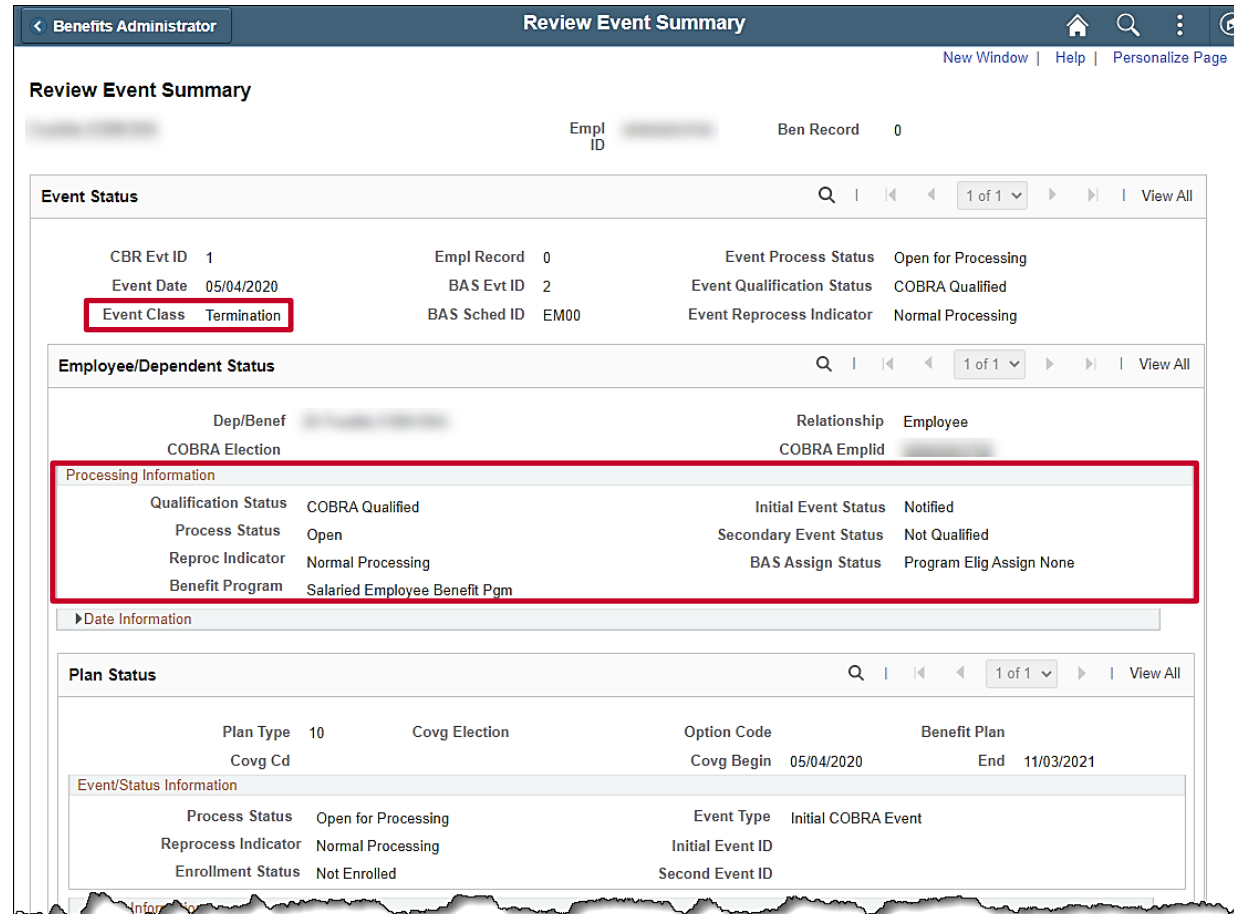
1. With the exception of COBRA General Notice distributed upon eligibility for Health coverage, Agencies no longer need to create and send COBRA notification letters upon COBRA events. OHB will also administer COBRA enrollment.
2. Agency BAs run and review Event Summary Report and COBRA Enrollment Report
  - a. Event Summary Report lists all COBRA-eligible individuals with corresponding Event Status and Enrollment Status
  - b. COBRA Enrollment Report displays COBRA enrollees' health coverage, dependent information, coverage begin date, and coverage end date





# COBRA Review Event Summary Page

The **Event Class** field automatically triggers COBRA events. BAs have access to the COBRA Review Event Summary page for reference purposes to answer relevant COBRA questions.



**Review Event Summary**

Empl ID: [REDACTED] Ben Record: 0

**Event Status**

|                                 |                    |  |
|---------------------------------|--------------------|--|
| CBR Evt ID: 1                   | Empl Record: 0     | Event Process Status: Open for Processing    |
| Event Date: 05/04/2020          | BAS Evt ID: 2      | Event Qualification Status: COBRA Qualified  |
| <b>Event Class: Termination</b> | BAS Sched ID: EM00 | Event Reprocess Indicator: Normal Processing |

**Employee/Dependent Status**

|                       |                          |
|-----------------------|--------------------------|
| Dep/Benef: [REDACTED] | Relationship: Employee   |
| COBRA Election        | COBRA Emplid: [REDACTED] |

**Processing Information**

|  |   |
|--|---|
| Qualification Status: COBRA Qualified          | Initial Event Status: Notified              |
| Process Status: Open                           | Secondary Event Status: Not Qualified       |
| Reproc Indicator: Normal Processing            | BAS Assign Status: Program Elig Assign None |
| Benefit Program: Salaried Employee Benefit Pgm |   |

**Plan Status**

|               |               |                        |                 |
|---------------|---------------|------------------------|-----------------|
| Plan Type: 10 | Covg Election | Option Code            | Benefit Plan    |
| Covg Cd       |               | Covg Begin: 05/04/2020 | End: 11/03/2021 |

**Event/Status Information**

|  |                                 |
|--|---------------------------------|
| Process Status: Open for Processing    | Event Type: Initial COBRA Event |
| Reprocess Indicator: Normal Processing | Initial Event ID                |
| Enrollment Status: Not Enrolled        | Second Event ID                 |

**Note:** For further information on the **Review Event Summary** page, see the Job Aid titled **BN361 COBRA Review Event Summary Page**. This Job Aid can be found on the Cardinal Website in **Job Aids** under **Training**.



# COBRA Enrollment Report Example

The COBRA Enrollment Report provides BAs with a consolidated list of all COBRA enrollees

**Navigation:** Navigator > Administer COBRA Benefits > Review Processing Results > Enrollment Report

Report ID: CBR006  
From Date: 01-JAN-2020  
Thru Date: 31-DEC-2020  
Benefit Program: SPT

PeopleSoft  
COBRA ENROLLMENT REPORT

Page No. 24  
Run Date 12/22/2020  
Run Time 12:54:00

| Employee ID | Empl ID Rcd# | COBRA Event ID | Dep ID | Participant Name | Plan Type | Covrg Elect | Benefit Plan | Coverage Coverage | Coverage Elect Date | Coverage Begin Date | Coverage End Date |
|-------------|--------------|----------------|--------|------------------|-----------|-------------|--------------|-------------------|---------------------|---------------------|-------------------|
|             | 0            | 1              | 00     |                  | 10        | E           | CHA          | EE+Spouse         | 10/29/2020          | 05/01/2020          | 10/31/2020        |
|             | 0            | 1              | 00     |                  | 10        | E           | KP           | Single            | 07/31/2020          | 07/01/2020          | 06/30/2023        |

Benefit Program SPT Total: 3



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make Note of your answer below.



1. In Cardinal, COBRA processing is centralized and handled by OHB.
  - a) True
  - b) False



2. Enrollment into COBRA can be performed through Employee Self-Service.
  - a) True
  - b) False



# Lesson Summary

6

## COBRA Administration

In this lesson, you learned

- How to administer COBRA
- The impacts associated with OHB now being the handler of COBRA processing
- How to review the COBRA enrollment report and employee statuses





# Lesson

7

## Benefits Reconciliation

This lesson covers the following topics:

- Health Benefit Reconciliation
- VRS Billing Reconciliation



# Benefits Reconciliation

The Benefits Reconciliation business process involves steps to identify differences between the expected contributions and the amounts collected in Cardinal Payroll for both health benefits and VRS retirement.

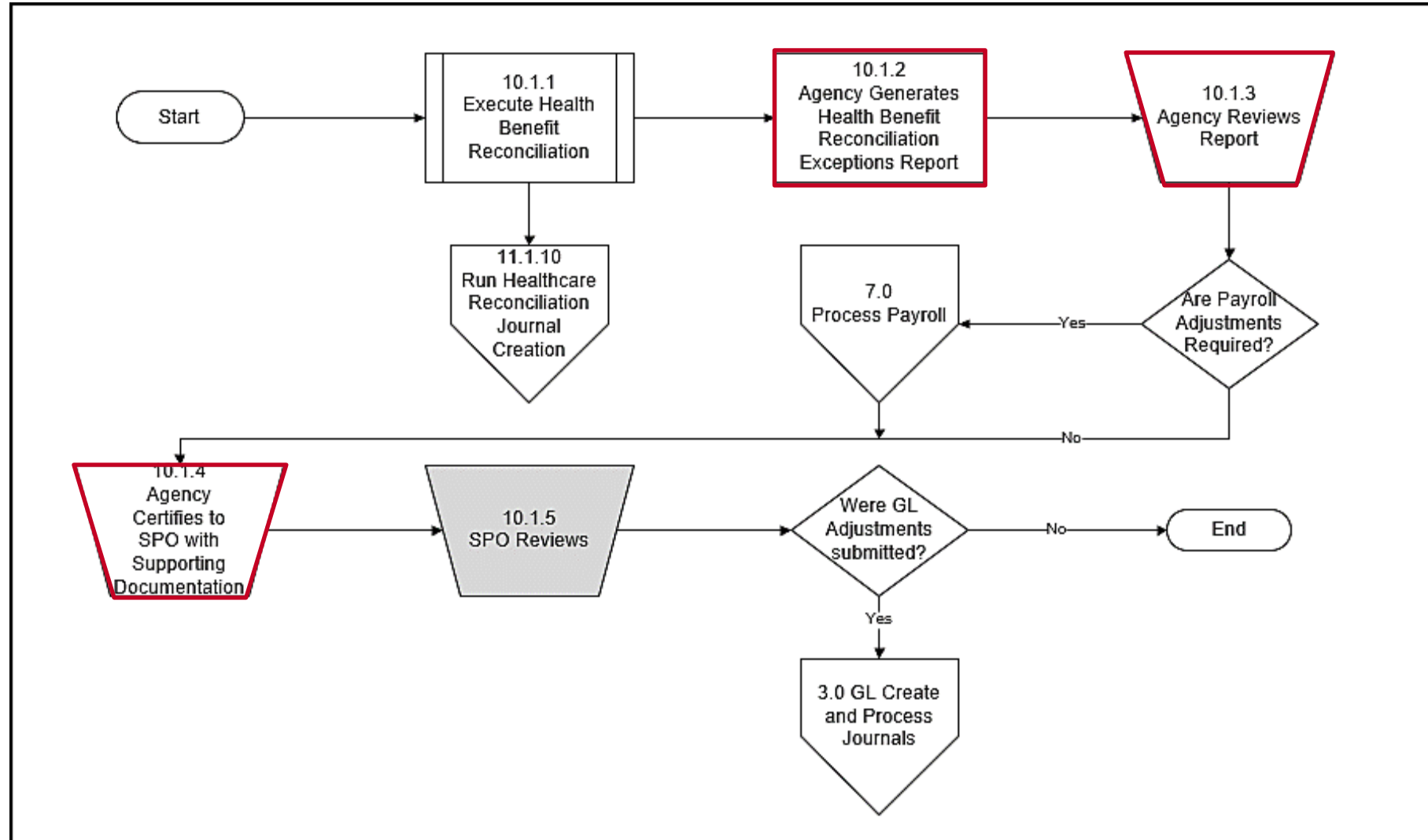
The Benefits Reconciliation business process includes the following sub-processes:

- Health Benefit Reconciliation
- VRS Billing Reconciliation

**Note:** Benefit Reconciliation only applies to Payroll Agencies



# Healthcare Reconciliation Process Flow





# Health Benefit Reconciliation

The Health Benefit Reconciliation process automatically compares Cardinal effective dated health benefit enrollments with payroll deductions to determine and report variances in the health benefit premium. The process automatically generates General Ledger journals to refund overpayments and charge under collections to the agencies.

PPS runs the Health Benefit Reconciliation program monthly to identify differences between expected premiums (according to the health care plan enrollment) and premiums collected in Cardinal.

1. PPS executes Health Benefit Reconciliation process
2. Agency generates the Health Benefit Reconciliation Exceptions Report
  - a. Agency designated personnel (i.e., benefits or payroll administrators) and SPO generate Health Benefit Reconciliation Exceptions Report (RHR070) monthly, after the payroll schedule posts
  - b. Health Benefit Reconciliation Exceptions Report identifies variances between monthly payroll contributions and enrollment records (i.e., discrepancies between employee premiums, employer premiums, and total premiums)



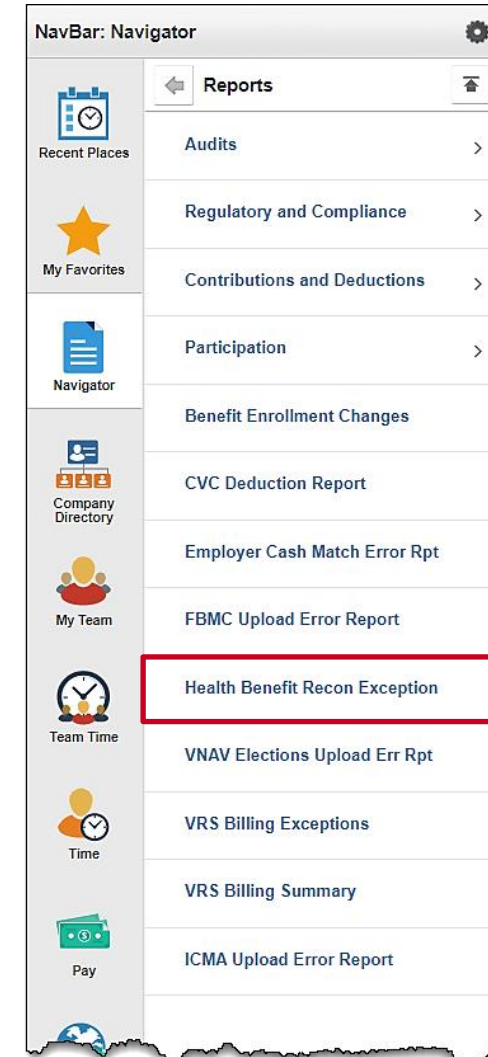
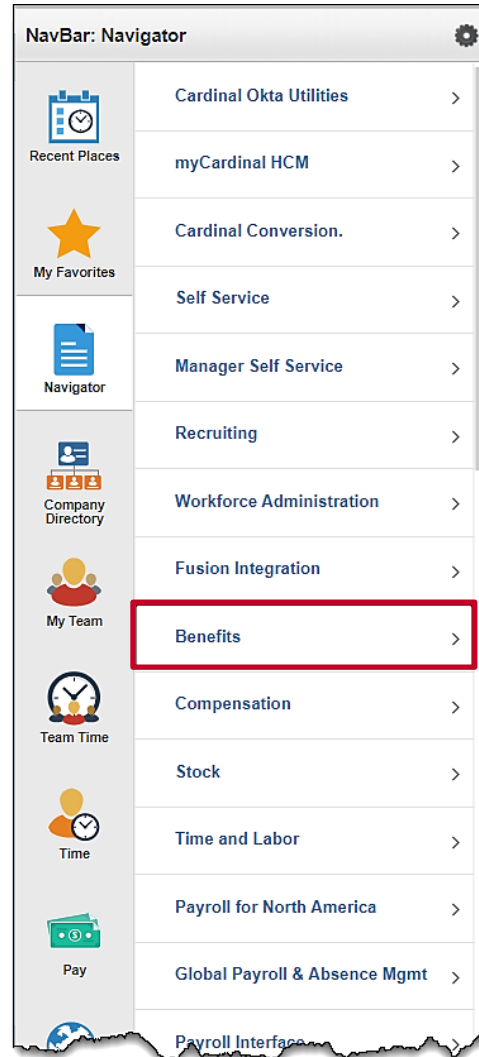
# Health Benefit Reconciliation (continued)

3. Agency reviews report
  - a. Agency designated personnel required to review Health Benefit Reconciliation Exceptions Report
  - b. Health Benefit Reconciliation program does not include retroactive adjustments for previous months
  - c. Agency personnel identify required GL adjustments and contact SPO accordingly
  - d. Agency BAs use Benefit Contribution Register to review employee and employer benefit contributions
4. Agency certifies to SPO with supporting documentation
  - a. Agency Fiscal Officer certifies accuracy by signing Certification Form after all health benefit premium amount variances and employee premium reward variances are reviewed
  - b. Signed Certification Form and supporting documentation submitted to SPO
5. SPO reviews with Agencies
  - a. SPO reviews health care certification packet as they are received
  - b. SPO Accountant verifies adjustments requested by agency payroll processors are accurate and GL Journal spreadsheet completed in accordance with published Cardinal Financials guidelines



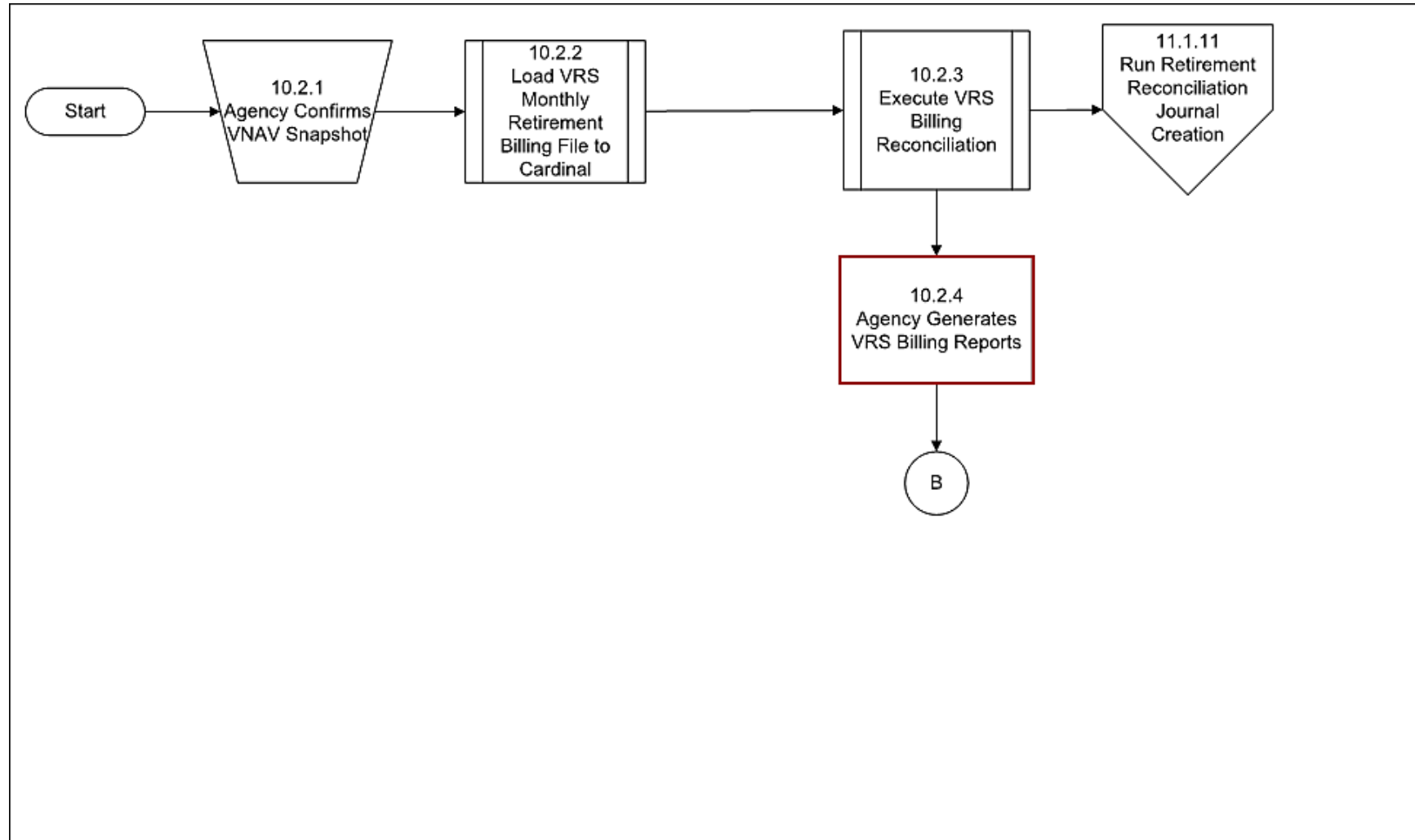
# How to access the Health Benefit Reconciliation Exceptions Report

Navigation: Benefits > Reports > Health Benefit Recon Exception



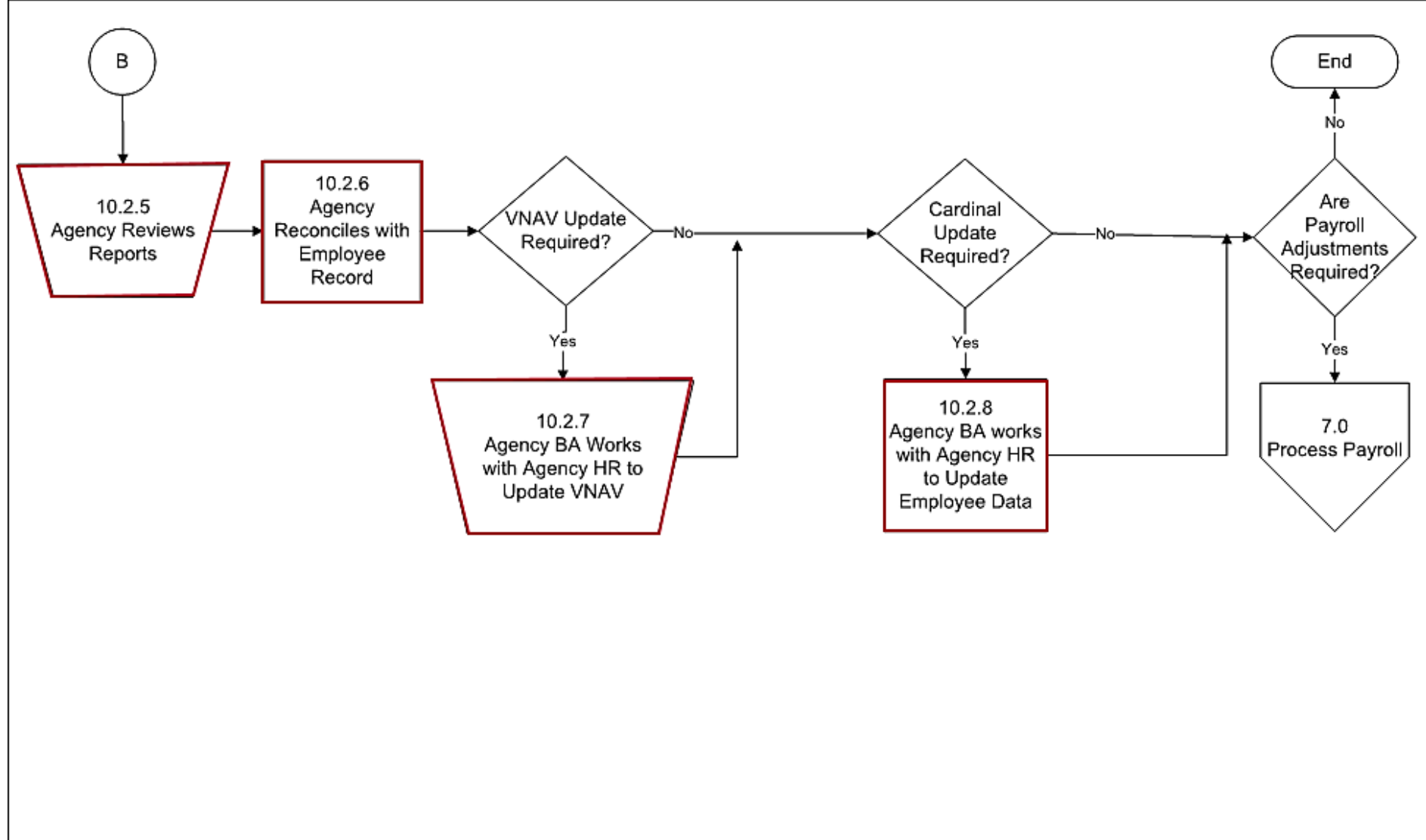


# VRS Billing Reconciliation Process Flow





# VRS Billing Reconciliation Process Flow (continued)







# VRS Billing Reconciliation

The VRS Billing Reconciliation program runs monthly to compare the VRS retirement billing file with retirement deductions processed through Cardinal Payroll. The reconciliation identifies differences between the expected retirement contribution amounts according to employee retirement plan enrollments in VNAV and the retirement contributions actually collected through the combination of employee and employer deductions in Cardinal Payroll.

1. Agency confirms VNAV Snapshot
  - a. Initial step to reconcile VRS benefits
2. PPS loads VRS Monthly Retirement Billing File to Cardinal
  - a. Includes expected monthly contributions for prior calendar month, retirement plan codes, and total Agency contributions
3. PPS executes VRS Billing Reconciliation
  - a. Cardinal automatically compares VRS Retirement Billing file employee data with deductions taken from employee's paycheck



## VRS Billing Reconciliation (continued)

4. Agency generates VRS Billing Reports
  - a. Agency payroll processors and SPO generate monthly VRS Billing Reports after SPO is notified VRS Billing Reconciliation is complete
  - b. Reports include:
    - i. VRS Billing Report contains all transactions (grouped by retirement plan and include totals by plan and entire report) from the VRS Billing Upload File to be processed by the VRS Billing Reconciliation program
    - ii. VRS Billing Exceptions Report identifies variances (e.g., company number, retirement plan code, and amounts) between monthly Cardinal retirement contributions and the VNAV records
    - iii. VRS Billing Summary Report recaps total retirement costs in VNAV, retirement contributions deducted in Cardinal Payroll, and differences between actual retirement costs and deducted retirement contributions
5. Agency reviews reports
  - a. Agency payroll processors are required to review VRS Billing Reports, especially VRS Billing Exceptions Report
  - b. The VRS Billing Reconciliation Program includes retroactive adjustments for previous months as corrections are made
    - i. Corrections may be made directly in VNAV, eliminating need for adjusting journal entries or may require a Job Update that feeds into VNAV, depending on the nature of the discrepancy.



# Generate and Review the VRS Billing Summary Demonstration

BAs can view and open reports after the **Run Status** field updates to “**Success**” and the **Distribution Status** field updates to “**Posted**”

**Navigation:** Navigator > Benefits > Reports > VRS Billing Summary

Process Monitor

Process List

Server List

View Process Request For

User ID

Type

Last

1

Days

Refresh

Server

Name

Instance From

Instance To

Report Manager

Run Status

Distribution Status

Save On Refresh

Process List

1-4 of 4

View All

| Select                   | Instance | Seq. | Process Type | Process Name | User | Run Date/Time            | Run Status | Distribution Status | Details                 |
|--------------------------|----------|------|--------------|--------------|------|--------------------------|------------|---------------------|-------------------------|
| <input type="checkbox"/> | 1317534  |      | SQR Report   | VHRR0079     |      | 11/20/2020 4:21:12PM EST | Queued     | N/A                 | <a href="#">Details</a> |
| <input type="checkbox"/> | 1317533  |      | SQR Report   | VHRR0079     |      | 11/20/2020 4:19:58PM EST | Success    | Posted              | <a href="#">Details</a> |
| <input type="checkbox"/> | 1317532  |      | SQR Report   | VHRR0079     |      | 11/20/2020 4:19:44PM EST | Success    | Posted              | <a href="#">Details</a> |
| <input type="checkbox"/> | 1317528  |      | SQR Report   | CBR006       |      | 11/20/2020 3:03:20PM EST | Success    | Posted              | <a href="#">Details</a> |



## VRS Billing Reconciliation (continued)

6. Agency reconciles with Employee Record
  - a. Agency BAs in conjunction with the Agency HR Administrator, make necessary adjustments to employee's retirement and/or savings plan enrollment if VRS Billing Exception Report indicates Cardinal does not match current record in VNAV
  - b. Agency Payroll Processor works with the Agency BA to update Cardinal if an HR Administrator manually updates VNAV but fails to also update Cardinal
7. Agency Payroll Processor works with Agency HR to update VNAV



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make Note of your answer below.



1. Which of the following items below are included in the VRS Billing Report?

A. Voluntary Hybrid Deductions

C. Deferred Compensation Deductions

B. Traditional Retirement Deductions

D. Medical Premium Deductions



2. The Health Benefit Reconciliation process automatically generates General Ledger journals to refund overpayments and charge under collections to the agencies.

a) True

b) False



# Lesson Summary

7

## Benefits Reconciliation

In this lesson, you learned

- How to generate the Health Benefit Reconciliation Exceptions Report
- How to certify to SPO
- How to confirm a VNAV Snapshot
- How to generate and review the VRS Billing Reports
- How to reconcile errors from both Health Benefit and VRS Billing reports and update employee records if necessary



# Lesson

8

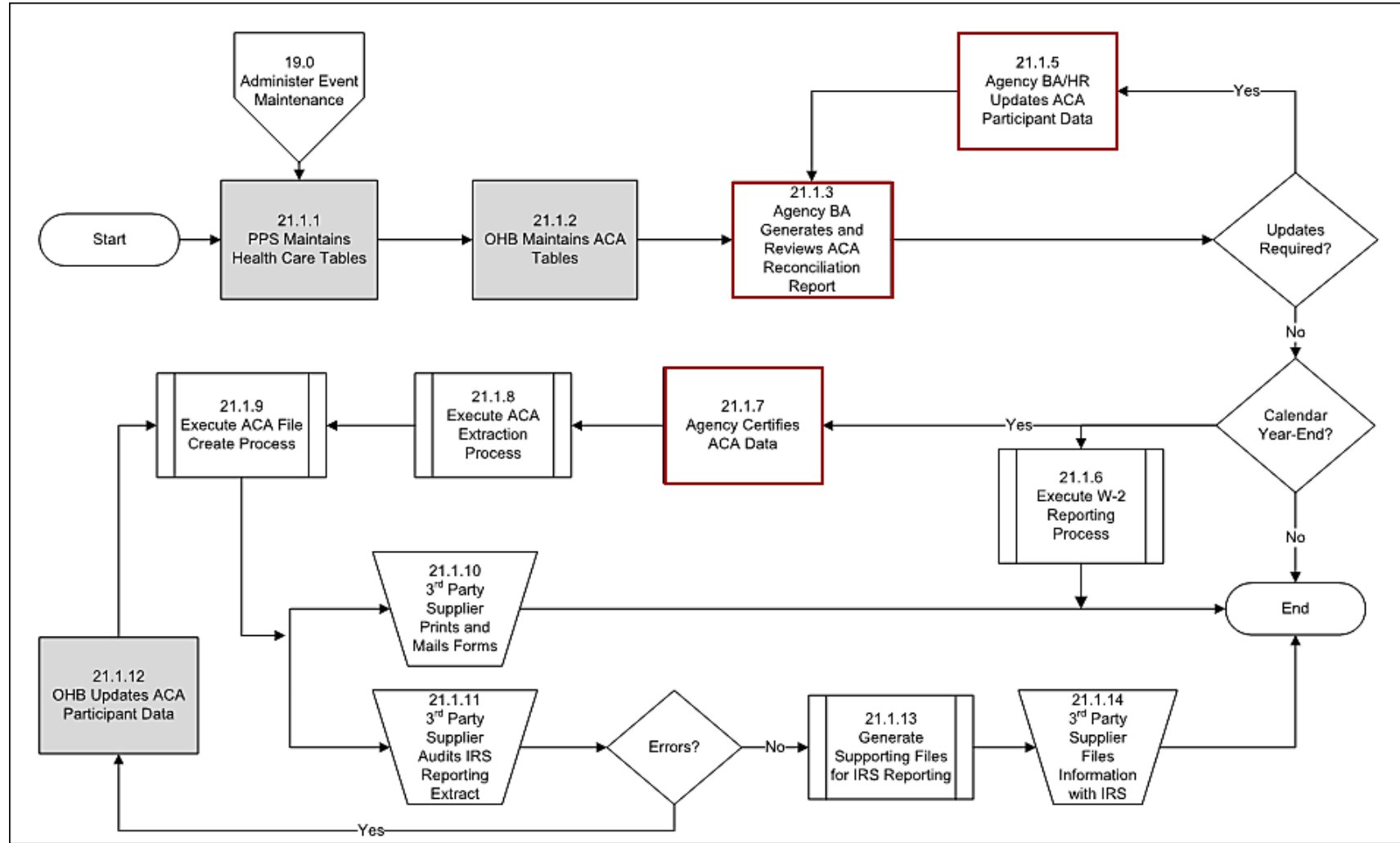
## ACA Administration

This lesson covers the following topics:

- Overview of ACA Reporting



# ACA Reporting Process Flow







# Manage ACA Reporting

The **ACA Reporting** business process involves capturing the data elements required to create annual regulatory forms for health benefit participants and annual regulatory reporting to the Internal Revenue Service (IRS). The **ACA employee eligibility** page is systematically established based on enrollment, but occasionally needs to be manually established for an employee.

1. Agency BA creates ACA Excel Files and reviews ACA Reconciliation Report
  - a. Agency BA runs **ACA Reconciliation Report** as comma separated values (csv) file
  - b. Individual Agencies run ACA Reconciliation
    - i. Delineates employment and enrollment statuses of each participant and dependent
    - ii. Contains separate line per individual, notating statuses by month during the calendar year
  - c. Run and reviewed at any point
  - d. Suggesting the report runs on a monthly basis
2. Agency BA/HR updates ACA participant data
  - a. Agency BA works with Agency to establish required records to invoke a Benefits Event
3. Agency BA certifies ACA data
  - a. Agency enters employer data online using **ACA Data Entry** page

**Note:** The healthcare premium value is reported on the W-2, in box 12 with a code of DD. This process which is outside of ACA Reconciliation is totally handled by PPS. (Only for Payroll Agencies)



# ACA Employee Eligibility Page

Employees will only be picked up by the ACA Process if they have an eligible record.

Always Eligible

Always Eligible

Eligible

Excluded

Ineligible

To be determined

Benefits Administrator

ACA Employee Eligibility

New Window | Help | Personalize Page

ACA Employee Eligibility

Employee ID

Affordable Care Act Common ID DOT VA Dept of Transportation

Eligibility Information

\*Effective Date02/01/2020

\*ACA Eligibility StatusAlways Eligible

Average Service Hours0.000

Calculation MethodLook Back

Evaluation Begin Date

Administration Begin Date

Stability Begin Date

Effective Sequence0

☐ Non-Assessment Period

Work PeriodMonthly

Measurement Period

Evaluation End Date

Administration End Date

Stability End Date

ACA Calculation Hours

| Empl Record | Company | Description | Total Hours |
|-------------|---------|-------------|-------------|
| 0           |         |             |             |

Total Eligibility Hours

Last Update User ID BATCH

Updated on 06/04/2020 12:33:06PM

OK

Cancel

Apply

**Note:** On the hire date of the employee, they will get a new row with the status of **Eligible**. On the date the benefits will be effective, the employee will get an added row with a status of **Always Eligible**. If the employee is hired on the first of the month, they will only have one status row of **Always Eligible**. If the employee is not eligible for health insurance, the status is **Ineligible**.



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make Note of your answer below.



1. An employee will only get picked up by the ACA Process if he/she has a record set up on the ACA Employee Eligibility page.
  - a) True
  - b) False



2. How often should the ACA Reconciliation Report be run by Agency BAs?
  - a) Monthly
  - b) Weekly
  - c) Daily
  - d) Yearly



# Lesson Summary

8

ACA Administration

In this lesson, you learned

- An overview ACA Reporting
- How to generate, review and certify the ACA Data



# Course Summary

BN361

Cardinal Employee Benefit Enrollment and Maintenance

In this course, you learned


- An overview of Cardinal Benefits Basics
- How to use the On-Demand Event Maintenance Page to work with Benefit Events
- The Benefit Plan elections in Cardinal and how to conduct manual updates to Benefit Events
- An overview of Benefit Summaries & Confirmation Statements
- How to administer QMCSO
- How to administer COBRA
- How to track and manage Benefits Reconciliations
- How to administer ACA Reporting



# How to Complete Course Evaluations

The following steps can be used to complete course evaluations at the end of an ILT or VILT training session. **Please note that it may take a couple of hours after the completion of your course for evaluations to be available.**

1. Navigate to the Cardinal Learning Homepage.
2. Enter your username in the **Username** field.
3. Enter your password in the **Password** field.
4. Click the red **Log In** button.



Please enter your Username and Password

Carrie Cardinal

.....

Log In

[Forgot password?](#)

Need help logging in? [Contact us!](#)

**Welcome to Cardinal Learning!**

**The Cardinal Learning curriculum combines:**

- Web-Based Training (WBT)
- Instructor-Led Training (ILT)
- Virtual Instructor-Led Training (VILT)

**Use Cardinal Learning to:**


- View assigned curriculum
- Complete WBT courses
- Register for ILT and VILT courses





# How to Complete Course Evaluations (Continued)

5. The **Cardinal Learning Homepage** displays.

You are currently logged in as Carrie Cardinal





HomeLearning

Welcome, Carrie, to Cardinal Learning!

Get Ready for Instructor-Led Training!

1. Click Open Curriculum to review and register for assigned training.


2. Sign up for a Technology Readiness Session prior to your first Instructor-Led Training (ILT).

3. Complete all assigned Web-based Training (WBT).


4. Attend ILTs!

Training Notes


| If you are assigned... | Then...   |
|------------------------|---|
| HR351                  | You must complete the course prior to all other ILTs                                  |
| BN361                  | You can complete it at any time after all WBTs, TECH and HR351 or HR353 are completed |
| TA Courses             | You must complete in sequential order as assigned: TA371 > TA372 > TA374              |
| PY381                  | All assigned TA courses must be completed prior to taking PY381                       |

Web-Based Training


No Training in Progress

Upcoming Sessions


|  | Status     |
|--|------------|
| HR351 - Employee Data Setup and Maintenance (Starts 7/27/2021) | Registered |
| TA372 - Time & Attendance Administration (Starts 8/11/2021)    | Registered |

My Training

|                                     | Due Date | Status      | Action                          |
|-------------------------------------|----------|-------------|---------------------------------|
| TECH - Technology Readiness Session | None     | Denied      | <a href="#">Select Session</a>  |
| HR, TA                              | None     | In Progress | <a href="#">Open Curriculum</a> |

My Waitlist Tracking

You have no waitlisted sessions.  
You have indicated interest in 1 event(s).






# How to Complete Course Evaluations (Continued)

6. Hover over the **Learning** tab in the **Global Navigation** bar.
7. In the displayed dropdown menu, click **View Your Transcript**.

You are currently logged in as Carrie Cardinal




Home **Learning**

Welcome, Carrie! **View Your Transcript** **Get Ready for Learning!**

**Get Ready**  
Interests and Waitlists  
1. Click on the **Get Ready** link in the **Global Navigation** bar.  
2. Sign up for a Technology Readiness Session prior to your first Instructor-Led Training (ILT).  
3. Complete all assigned Web-based Training (WBT).  
4. Attend ILTs!

**Training Notes**

| If you are assigned... | Then...   |
|------------------------|---|
| HR351                  | You must complete the course prior to all other ILTs                                  |
| BN361                  | You can complete it at any time after all WBTs, TECH and HR351 or HR353 are completed |
| TA Courses             | You must complete in sequential order as assigned: TA371 > TA372 > TA374              |
| PY381                  | All assigned TA courses must be completed prior to taking PY381                       |



**Web-Based Training**  
No Training in Progress

**My Training**

|                                     | Due Date | Status      | Action          |
|-------------------------------------|----------|-------------|-----------------|
| TECH - Technology Readiness Session | None     | Denied      | Select Session  |
| HR, TA                              | None     | In Progress | Open Curriculum |

**My Waitlist Tracking**  
You have no waitlisted sessions.  
You have indicated interest in 1 event(s).

**Upcoming Sessions**

|  | Status     |
|--|------------|
| HR351 - Employee Data Setup and Maintenance (Starts 7/27/2021) | Registered |
| TA372 - Time & Attendance Administration (Starts 8/11/2021)    | Registered |






# How to Complete Course Evaluations (Continued)

8. Your **Transcript** page displays.
9. Hover over the **Active** tab.
10. In the displayed dropdown, click **Completed**.

You are currently logged in as Carrie Cardinal



Home Learning

Carrie Cardinal Bio Transcript Actions

Home > Carrie Cardinal > Transcript: Carrie Cardinal

### Transcript: Carrie Cardinal

Use the transcript to manage all active training.

Active By Date Added All Types Search for training

Active  
Completed  
Archived

Technology Readiness Session (Starts 7/29/2021 9:00 AM)  
Due Date Status: Denied Select Session


HR, TA  
Due: No Due Date Status: In Progress Open Curriculum



# How to Complete Course Evaluations (Continued)

11. Your **Transcript** page refreshes.
12. Hover over the **View Certificate** button for the completed course.
13. In the displayed dropdown, click **Evaluate**.

You are currently logged in as Carrie Cardinal



Home Learning

Carrie Cardinal Bio Transcript Actions



Home > Carrie Cardinal > Transcript: Carrie Cardinal

### Transcript: Carrie Cardinal

Use the transcript to manage all active training.

Completed By Completion Date All Types Search for training

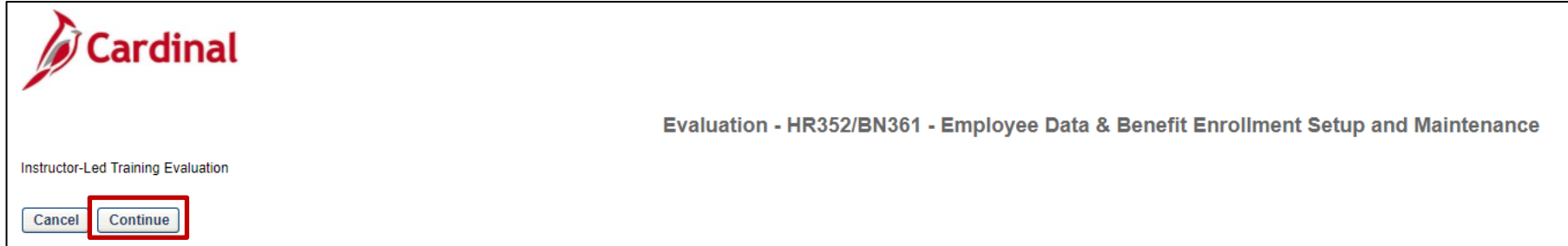
Search Results (2)


|   |  |  |
|---|--|--|
|  | <b>HR352/BN361 - Employee Data &amp; Benefit Enrollment Setup and Maintenance (Starts 7/20/2021 3:50 PM)</b><br>Completed: 7/20/2021 Status: Completed | <div>View Certificate</div> <div>View Certificate</div> <div>Evaluate</div> <div>View Training Details</div> |
|  | <b>A Test Event (Starts 6/17/2021 4:35 PM)</b><br>Completed: 6/17/2021 Status: Completed   |  |



# How to Complete Course Evaluations (Continued)

14. A course evaluation notification displays.
15. Click **Continue**.




 **Cardinal**

Evaluation - HR352/BN361 - Employee Data & Benefit Enrollment Setup and Maintenance

Instructor-Led Training Evaluation

16. The course evaluation displays.
17. Complete and submit the course evaluation.



 **Cardinal**

Evaluation - HR352/BN361 - Employee Data & Benefit Enrollment Setup and Maintenance

**Instructor-Led Training Evaluation(Virtual and In-Person)**

**Question 1 .**

Please select the name of your Agency.

- ☐ Auditor of Public Accounts
- ☐ Danville Schools
- ☐ Department of Accounts
- ☐ Department of Agriculture and Consumer Services
- ☐ Department of Emergency Management
- ☐ Department of Human Resource Management
- ☐ Department of Small Business and Supplier Diversity
- ☐ Fort Monroe Authority
- ☐ James Madison University

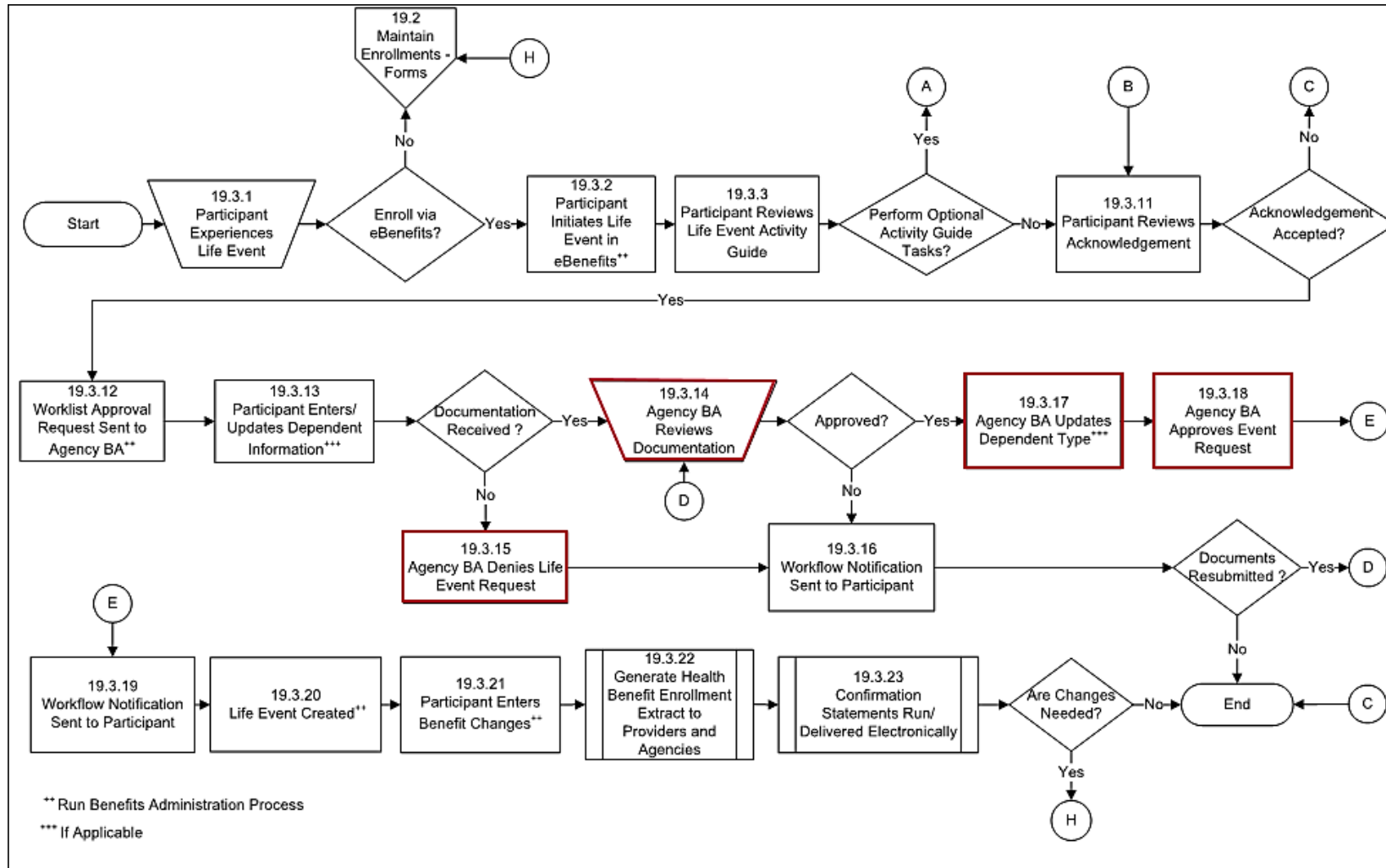


# Appendix

- Life Events Overview
- Open Enrollment Overview
- Flowchart Key

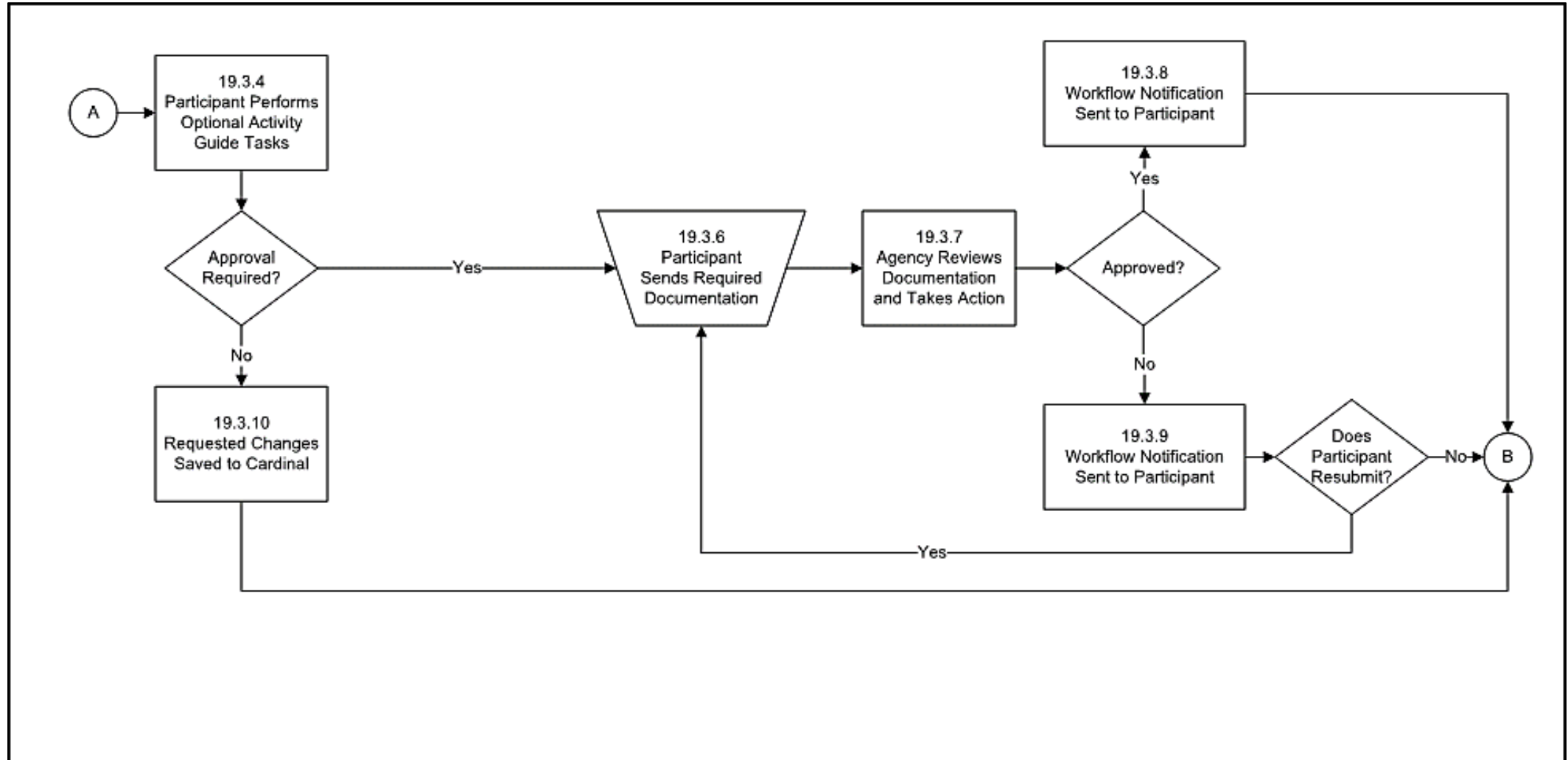


# Life Events Process Flow





# Life Events Process Flow (continued)





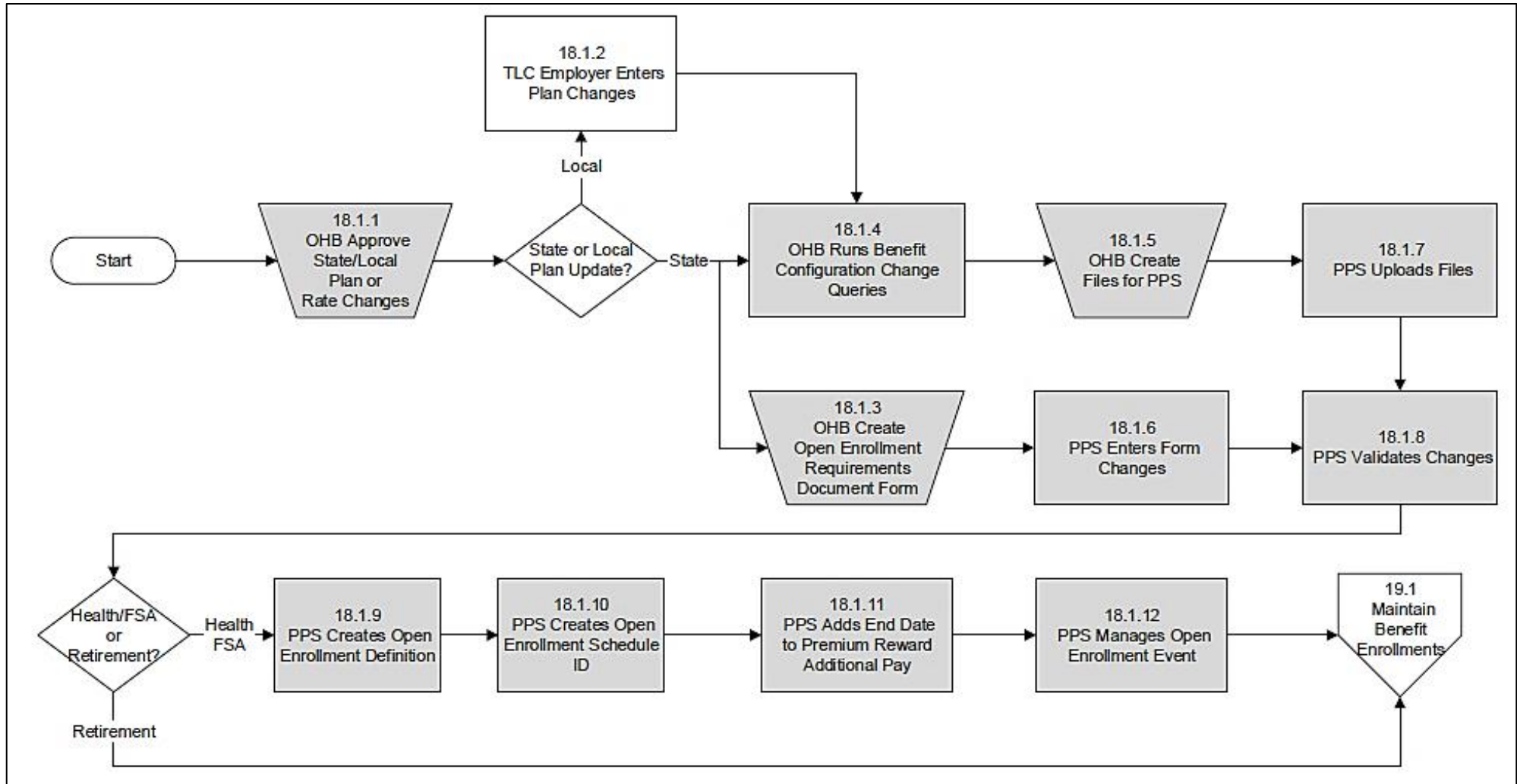
# Administering Open Enrollment

The **Administer Open Enrollment** business process is composed of the tasks performed by OHB and the Cardinal Post Production Support (PPS) in advance of each enrollment period. These tasks include the configuration and maintenance of tables containing benefits plan attributes.

The **Administer Open Enrollment** business process includes the **Manage Open Enrollment** sub-process



# Administer Open Enrollment Process Flow





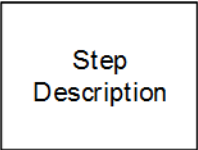

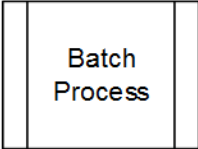
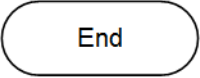
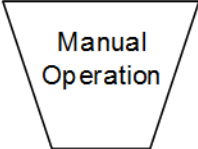
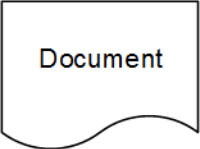
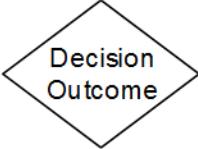
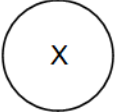
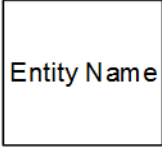
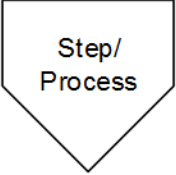


# Manage Open Enrollment

- BAs can run the Defaulted OE Election Report (RBN009) to identify those employees who didn't take action during the Open Enrollment period. Those employees will therefore be automatically enrolled in a plan.
  - If a plan is available now, and won't be available next year, it will automatically move those employees to the new plan. Those employees get automatically defaulted into the new plan if they don't make an election.
- During OE the Dependent Approval Report (RBN301) will identify any unapproved dependents.
  - During OE, this report should be run daily to keep up with the volume of reviews and subsequent actions.
- The Benefit Event Status Report (RBN300) provides a list of events and their specific statuses.



# Flowchart Key

|   |  |   |  |
|---|--|---|--|
|    | Depicts a process step or interface.   |    | Indicates point at which the process begins.<br>Does not represent any activity.   |
|    | Specifies a batch process.   |    | Indicates point at which the process ends.<br>Does not represent any activity.   |
|    | Depicts a process step that is preformed manually.   |    | Depicts a document of any kind, either electronic or hard copy.  |
|   | Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding. |    | Indicates an on-page or intra process connector.<br>Used to avoid complex overlapping connector lines or to continue a process on a subsequent page. |
|  | Represents an entity (person, organization, etc.).   |  | Connects steps between business processes.   |